

FOOD SECURITY MONITOR

EDITION 63 • OCTOBER 2025

**AFRICA
FOOD TRADE
AND RESILIENCE
INITIATIVE**



The monthly Food Security Monitor is a critical tool for stakeholders across the African agricultural landscape. This report equips policymakers, practitioners, and the wider community with vital insights to navigate challenges, prioritise interventions, and ultimately build a more food-secure future for all. This 63rd edition provides an overview of the food security situation and market prices across East, South, and West Africa.

The Food Security Monitor is produced with support from the UK Government's Foreign, Commonwealth & Development Office (FCDO) through the Africa Food Trade & Resilience Programme.

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Summary

AGRA's monthly Food Security Monitor serves as a vital tool for sharing timely data with key stakeholders, supporting informed, evidence-based decisions across the agricultural sector. Below are key highlights from the October 2025 Food Security Monitor edition:

Food Commodity Prices Updates

Staple food and input markets across **East Africa** showed mixed price movements in October 2025. Maize prices generally declined month-on-month due to improved harvests, except in Rwanda (+10% to USD 440/MT). South Sudan remained volatile despite a 19% drop to USD 923/MT, while **Tanzania** fell to USD 285/MT but remained 16.7% higher year-on-year. Rice prices were largely stable, with **South Sudan** easing to USD 695/MT (-5%) attributed to increased domestic and humanitarian supply. Tanzania recorded a slight decline to USD 917/MT (-2%), Rwanda rose marginally to USD 1,104/MT, and Kenya maintained the highest price at USD 1,288/MT due to continued import dependency.

Bean prices showed short-term stability with minor increases in Kenya and Uganda, while Tanzania recorded sharp declines, indicating strong supply. Wheat prices diverged across the region. **Kenya** posted a modest 2% month-on-month increase to USD 788/MT, largely driven by stock depletion, whereas Ethiopia recorded a moderate 4% decline to USD 545/MT. The latter was primarily attributed to local currency depreciation against the US dollar, with the exchange rate widening to ETB 152.8 per USD, exerting downward pressure on dollar-denominated prices. Fertiliser prices surged across the region, most notably **Rwanda** (NPK +19.95% month-on-month) and Kenya (CAN +14.26%). This reflected ongoing global supply chain disruptions, currency depreciation, and high import costs posing risks to production affordability and food security. These trends underscore persistent inflationary pressures and supply risks, highlighting the need for coordinated regional strategies to stabilise markets and safeguard food security.

Southern Africa's staple food markets exhibited mixed trends, influenced by seasonal harvest outcomes, currency fluctuations, and input costs. In **Malawi**, maize prices fell by 6.4% month-on-month to USD 729/MT (USD 279/MT at the parallel market rate¹), offering short-term relief likely linked to government interventions, including a state of catastrophe declaration and plans to import 200,000 MT of maize from Zambia. Despite the decline, prices remain significantly higher than both three- and six-month averages, reflecting persistent foreign exchange constraints under a fixed exchange regime. In **Zambia**, maize prices increased by 9% to USD 276/MT, driven by local currency appreciation and increased demand from Malawi. In **Mozambique**, rice prices eased by 4.7% to USD 934/MT due to improved availability. While favourable rainfall and government interventions have provided short-term relief in some areas, ongoing currency challenges and regional demand pressures continue to influence price dynamics. Ongoing monitoring will be essential to evaluate the impact of these developments on food security and market stability across the subregion. Fertiliser markets in Malawi and Mozambique showed contrasting trends with implications for agricultural planning. Malawi recorded sharp monthly declines in NPK (-17.17%) and urea (-15.04%) prices, though medium-term increases persist. Year-on-year, NPK remains 31.11% higher, while urea is 41.1% lower but still up over the past six months. Mozambique experienced modest changes, with NPK down 1.75% and urea up 1.01%, continuing a gradual upward trend. These trends highlight persistent affordability challenges for farmers, with Malawi showing short-term relief but medium-term strain, and Mozambique facing steady upward pressure.

In **West Africa**, staple food markets showed mixed short-term movements but an overall trend of price softening, driven by seasonal harvest inflows, policy interventions, and localised supply dynamics. Maize prices remained volatile: **Ghana** recorded a 6.7% increase to USD 407/MT supported by currency appreciation, while **Nigeria** and **Togo** experienced sharp declines (-5.3% and -8.3% respectively) due to import duty waivers and trader grain releases. Rice prices rose in coastal, import-dependent markets (Ghana, Nigeria, Togo) by 3-12%, reflecting currency pressures and long-term supply constraints. In contrast inland markets (Niger, Mali, Burkina Faso) recorded marginal declines. Millet prices broadly fell across **Burkina Faso**, **Mali**, and **Nigeria** (9-12% month-on-month) due to increased harvest inflows and subsidized grain sales, while **Niger remained** largely stable except minor spikes in Zinder and Dosso. Sorghum showed contrasting trends: Ghana saw a sharp rise (14% to USD 522/MT), while Nigeria and Burkina Faso recorded significant drops (16.5% and 10.4% respectively), underscoring regional supply imbalances.

Food Security Updates

East and Central Africa continue to face widespread and severe food insecurity, with South Sudan and Ethiopia experiencing the most critical conditions, including areas at risk of famine. In South Sudan, over 5.9 million people are

¹ Estimated Exchange rate of 1USD: 4500MWK

in Crisis (IPC Phase 3) or worse, a figure projected to rise to 7.5 million during the April–July 2026 lean season, driven by conflict, flooding, and economic collapse. In Ethiopia over 8 million people in Crisis with more than 1 million in Emergency, largely due to conflict, high food prices, and climate shocks. Kenya’s ASAL regions remain highly vulnerable, with 2.1 million people expected in IPC Phase 3 or higher by early 2026. Uganda continues to experience food gaps in Karamoja and refugee-hosting districts despite seasonal improvements. Tanzania shows moderate but improving conditions, while Rwanda remains relatively stable with localised stress. Across the region, acute malnutrition is widespread, compounded by disease outbreaks, poor WASH services, and constrained livelihoods, underscoring the urgent need for sustained humanitarian and resilience interventions.

Food insecurity across **Southern Africa** remains severe, with mixed recovery signals. In Malawi, widespread IPC Phase 3 (Crisis) outcomes persist in southern and central regions due to depleted stocks, high food prices, and reduced labour demand, continuing from 2024 when maize prices exceeded 160% above the five-year average. Mozambique’s food-insecure population is projected to rise to 2.67 million in 2025/26, up from 1.8 million during the 2023/24 El Niño drought, driven by erratic rainfall and insecurity in Cabo Delgado. Zambia expects 1.7 million people to be in Crisis or worse, following the 2024 drought emergency that affected 6.6 million, which signifies a significant drop in the number of food-insecure people. Zimbabwe continues to face Crisis outcomes amid poor harvests and macroeconomic instability, following one of its driest seasons in decades. While some countries show signs of partial recovery, regional food security remains fragile, with millions still facing acute hunger.

West Africa faces severe and widespread food insecurity, with Burkina Faso, Mali, Niger, and Nigeria all experiencing Crisis (IPC Phase 3) or worse outcomes. Conflict-affected northern and eastern Burkina Faso and central Mali remain hotspots, with Mali also reporting Emergency (IPC Phase 4) conditions and alarming malnutrition rates. Niger continues to show extreme vulnerability, with over three-quarters of its population facing insufficient food consumption and conflict zones projected to remain in Crisis despite seasonal improvements. Nigeria has the largest affected population, with over 30 million people in IPC Phase 3 or higher, and conditions expected to worsen during the 2026 lean season. Across the region, insecurity, displacement, high food prices, and limited humanitarian access are driving acute food insecurity, underscoring the urgent need for sustained assistance and resilience-building interventions.

Food Trade Updates

- Ethiopia has officially started the shipment of goods under the African Continental Free Trade Area (AfCFTA) framework agreement. The first consignment, including meat, fruits, and various agricultural products, was dispatched to Somalia, Kenya, and South Africa.
- The Government of Zimbabwe has lifted its ban on the importation of maize, grains, oilseeds, and related products, reversing restrictions imposed in August 2025. This instrument opens imports while introducing phased local sourcing requirements (40% by April 2026 and 100% by April 2028) to protect domestic farmers.
- The Government of Malawi has secured a 200,000-tonne maize import deal with Zambia, although this is not enough to meet the projected maize deficit of 450,000 tonnes over the lean season. Tanzania has mandated its national food reserve agency to sell maize through an in-country office, hoping to provide a faster and formalised maize supply in Malawi.
- Ghana and Niger have signed a new trade agreement to streamline their shared transit corridor by harmonising customs procedures, improving cargo tracking, and reducing extortion and excessive checkpoints that inflate trading costs between West Africa’s coast and its landlocked interior.

Introduction

The AGRA Food Security Monitor reviews and discusses changes in selected variables and their implications on food trade, and food and nutrition security. The discussions presented here focus on selected countries of interest to the AGRA Regional Food Trade and Resilience Initiative: East Africa (Ethiopia, Kenya, South Sudan, Rwanda, Tanzania and Uganda), Southern Africa (Malawi, Mozambique, Zambia and Zimbabwe), and West Africa (Burkina Faso, Côte d'Ivoire, Ghana, Mali, Niger, Nigeria and Togo).

Food Security Dashboard

The Food Security Dashboard (**Table 1** and **Figures 1 and 2**) summarises trends in the number of people experiencing Insufficient Food Consumption (IFC)², identifies hunger hotspots, and tracks average changes in food prices over the past year. **Figure 1** illustrates the prevalence of IFC in October 2025 across 17 countries in Eastern, Southern, and Western Africa.

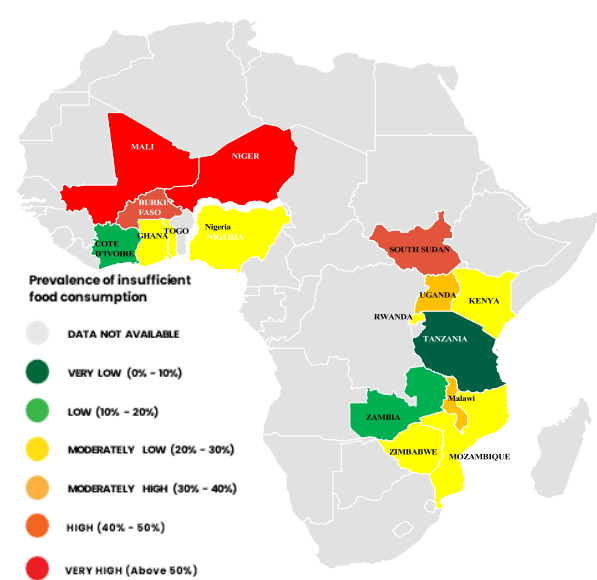
All monitored countries have experienced a rise in the number of people facing insufficient food consumption (IFC) compared to the same period last year. In October, Niger and Mali remained the most affected, with 76.6% and 52.46% of their populations, respectively, facing IFC. Burkina Faso and South Sudan also reported high levels, with 46.5% and 40.2% of their populations affected. Nigeria saw the largest increase in IFC, rising by 101.4%, followed by Niger and Uganda at 21.4% and 18%, respectively.

Regarding commodity prices, maize and imported rice have generally been more affordable across most regions compared to the past six month. Notable exceptions include Ethiopia (+15.48%), Malawi (+33.96%), Rwanda (+18.37%), South Sudan (+14.44%), and Uganda (+1.8%), where maize prices have increased. Compared to last year, price trends are mixed: increases were observed in Ethiopia, Kenya, Malawi, South Sudan, Tanzania, Uganda, and Zimbabwe, while other countries experienced declines.

Table 1: IFC and Commodities Price (Local Currency) Changes Figure 1: Hunger Hotspots Snapshot, October 2025

Country	Change (%) in people with insufficient food consumption from last 1 Month	Change (%) in people with insufficient food consumption from last 1 year	Commodity Price Changes (%) in the last 6 months	Commodity Price Changes (%) in the last 1 year
Burkina Faso	0.00	11.20	-9.29	-3.44
Ethiopia	0.00	8.40	15.48	2.52
Ghana	0.00	13.60	-33.66	-36.05
Kenya	0.00	6.80	-6.69	16.06
Malawi	0.00	13.20	33.96	1.62
Mali	0.00	7.60	-11.14	-16.34
Mozambique	0.00	21.40	-11.65	-27.22
Niger	0.00	101.40	-18.14	-25.33
Nigeria	0.00	3.60	18.37	14.44
Rwanda	0.00	4.90	14.44	41.09
South Sudan	0.00	5.20	-15.15	16.67
Tanzania	0.00	2.70	-21.81	-30.30
Togo	0.00	18.00	1.84	29.70
Uganda	0.00	3.30	-33.02	-28.99
Zambia	0.00	5.80	-10.82	1.69
Zimbabwe	0.00			

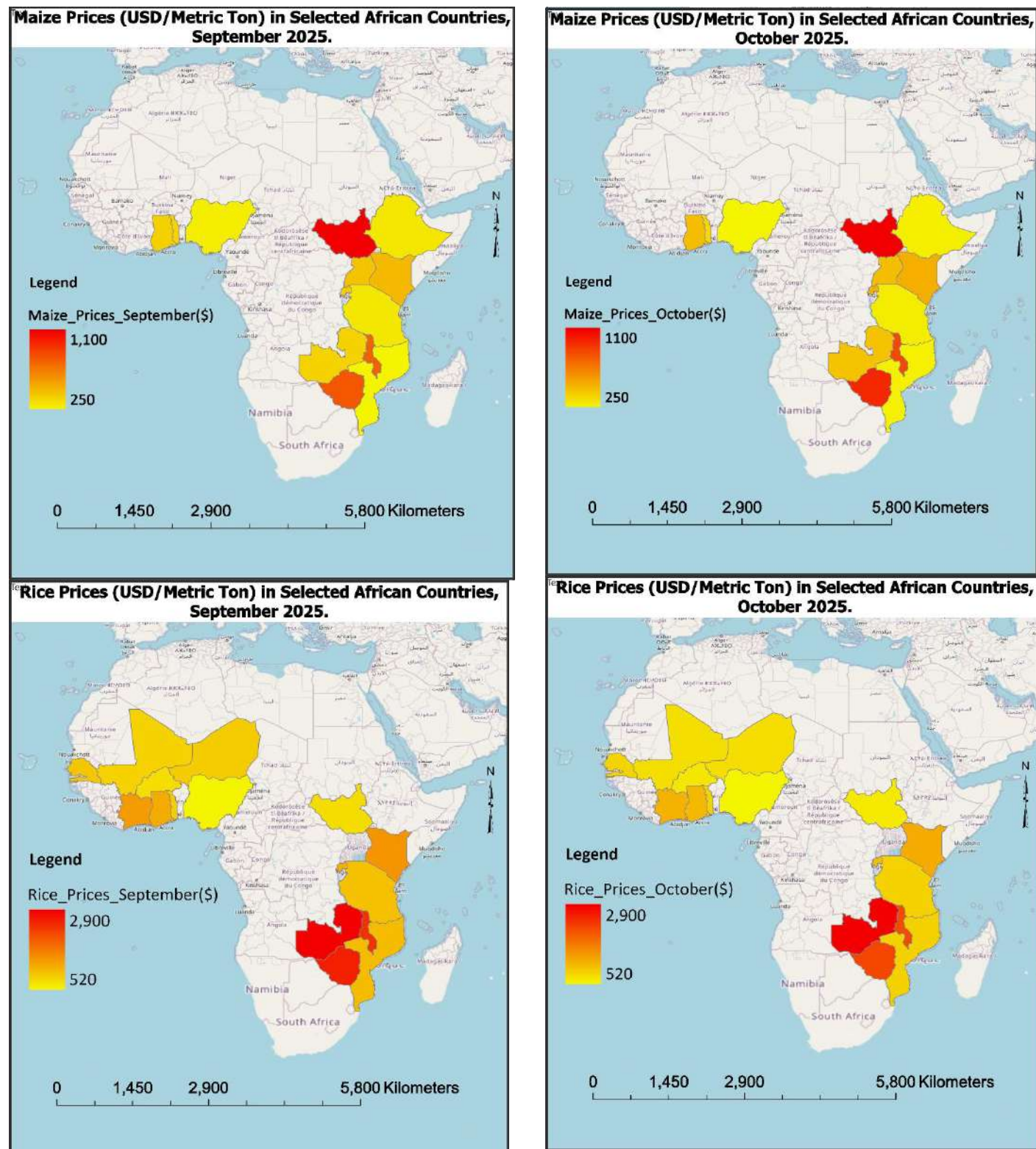
Key: ● No Change ↑ Increase ↓ Decrease



² People with Insufficient Food Consumption (IFC) refers to those with poor or borderline food consumption, according to the Food Consumption Score (FCS). The Food Consumption Score (FCS) is a proxy indicator for food security that measures the diversity of household diets and how frequently food is consumed. The FCS is calculated using the frequency of consumption of eight food groups by a household over seven days before the survey, using standardised weights for each food group reflecting its respective nutrient density. It then classifies households as having 'poor', 'borderline' or 'acceptable' food consumption. Poor food consumption typically refers to households that do not consume staples and vegetables every day and never, or very seldom, consume protein-rich food such as meat and dairy (FCS of less than 28). Borderline food consumption typically refers to households that consume staples and vegetables every day, accompanied by oils and pulses a few times a week (FCS of less than 42). Acceptable food consumption typically refers to households that consume staples and vegetables every day, frequently accompanied by oils and pulses, and occasionally meat, fish and dairy (FCS greater than 42).

Figure 2 shows maize and rice prices across monitored countries for September and October 2025. Maize prices remain highest in South Sudan at USD 923/MT, followed by Zimbabwe (USD 808/MT) and Malawi (USD 729/MT) in October, despite declines of 18%, 2%, and 6% respectively compared to September. The lowest maize prices were recorded in Nigeria (USD 263/MT), Mozambique (USD 276/MT), Ethiopia (USD 282/MT), and Tanzania (USD 285/MT). Similarly, rice prices were highest in Zambia (USD 2,909/MT), Zimbabwe (USD 2,250/MT), and Malawi (USD 2,192/MT) in October, reflecting increases of 16%, 1%, and 6% over September, while Nigeria (USD 586/MT) and South Sudan (USD 695/MT) reported the lowest rice prices.

Figure 2: The Prices of Maize and Rice Across All Monitored Countries (USD/MT)



Global Market Update

averaged 126.4 points in October 2025, representing 1.6% drop from its September's revised level of 128.5, marking a second consecutive monthly decline. Falling prices for cereals, dairy, meat, and sugar outweighed a rise in vegetable oils. Overall, the index was slightly below its October 2024 level and remains 21.1% lower than its peak in March 2022. In October 2025, the International Grains Council (IGC) Grain and Oilseeds Index (GOI) increased by 4.5% compared to the previous month but was down 1.3% year-on-year. All monitored grains, except rice, recorded modest month-on-month price increases. On an annual basis, wheat and rice prices fell by 4.6% and 29.1% respectively, while soyabeans and barley posted gains of 7% and 5.4%.

Figure 3: FAO Food Price Index (FFPI)³

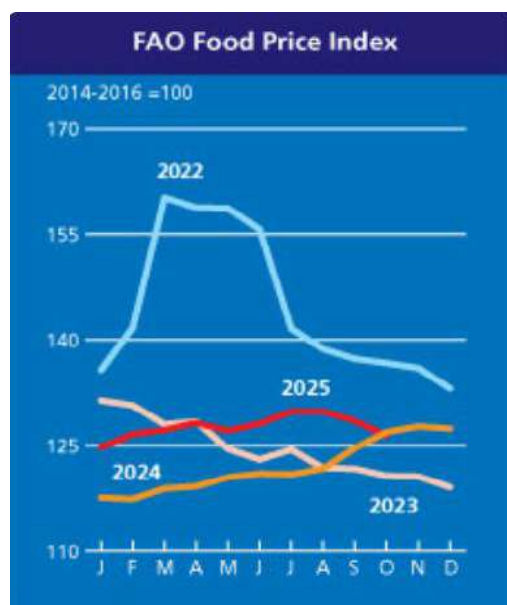


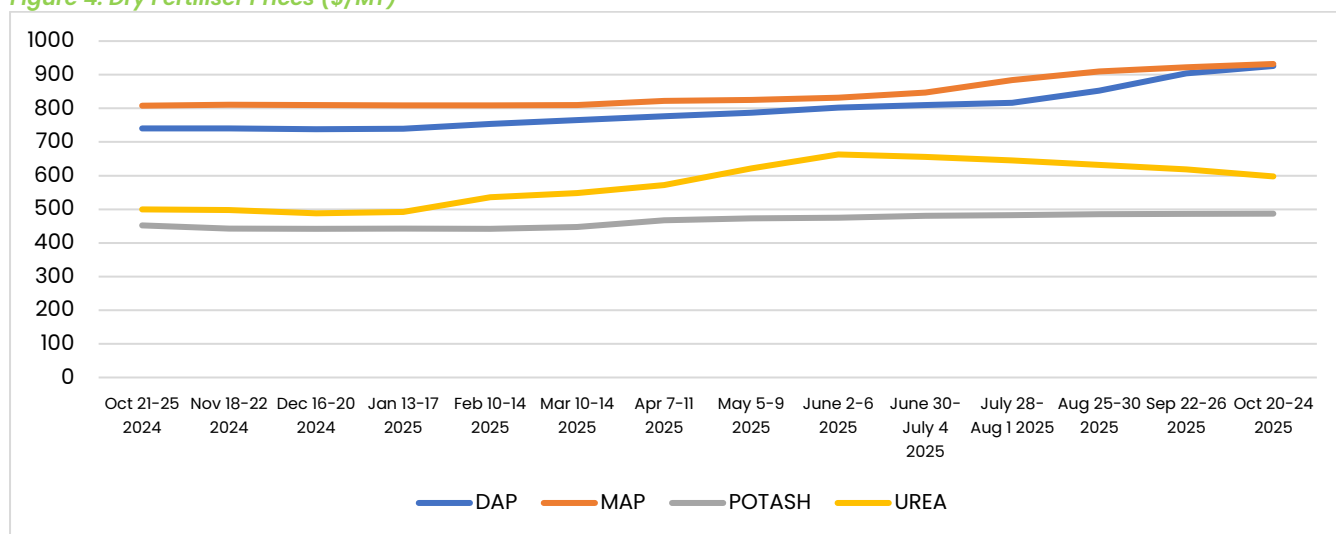
Table 2: IGC GOI Commodity Price Indices⁴

	Jan 2000 = 100	31-Oct	% Change 1M	% Change 1Y
GOI		218.96	4.49	-1.34
Wheat		193.26	2.06	-4.66
Maize		221.34	3.19	-
Rice		152.31	-3.74	-29.11
Soyabeans		223.17	8.04	7.01
Barley		226.56	0.67	5.38

Global Fertiliser Prices

Table 4 below shows that over the past month, fertiliser prices have generally remained stable with modest increases for DAP (+2.4%), MAP (+1.1%), and Potash (+0.2%), while Urea recorded a notable decline of 3.4%. However, when compared to the same period last year, all fertiliser types have experienced significant price hikes: DAP surged by 25.1%, Urea by 19.6%, and MAP by 15.3%, except Potash which saw a smaller increase of 7.7%. This indicates a long-term upward trend in fertiliser costs, particularly for DAP and Urea, despite short-term fluctuations.

Figure 4: Dry Fertiliser Prices (\$/MT)⁵



Source: Author's construction based on DTN⁵

³ <https://www.fao.org/worldfoodsituation/foodpricesindex/en/>

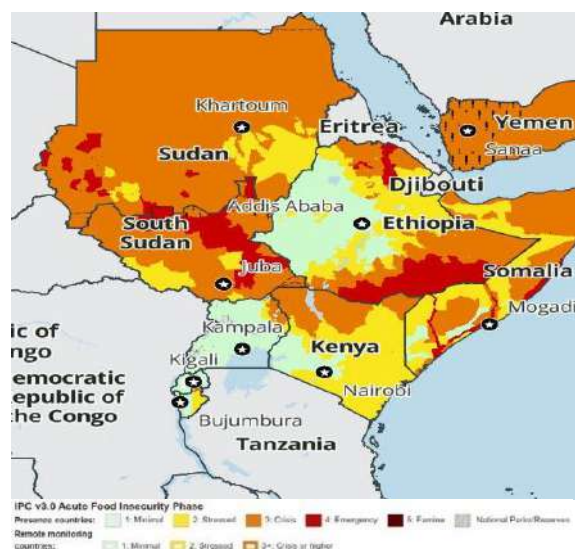
⁴ <https://www.igc.int/en/markets/marketinfo-goi.aspx>

⁵ <https://www.dtnpf.com/agriculture/web/ag/crops/article/2025/10/29/anhydrous-8-price-spike-one-month>

East Africa Food Insecurity Updates

Food Security Outlook

Figure 5: East African Countries Food Security Outlook, October 2025



South Sudan faces extremely high levels of acute food insecurity, driven by conflict, civil insecurity, widespread flooding, and economic collapse, which have displaced populations and disrupted livelihoods.⁶ Between September and November 2025, about 5.97 million people (42%) are in Crisis (IPC Phase 3) or worse, including 1.3 million in Emergency (IPC Phase 4) and 28,000 in Catastrophe (IPC Phase 5), mainly in Luakpiny/Nasir and Fangak counties. Conditions are projected to deteriorate sharply during the April–July 2026 lean season, with 7.55 million people (53%) expected to face IPC Phase 3 or higher, and famine risk persisting in hotspot areas under a worst-case scenario. Acute malnutrition remains critical, compounded by disease outbreaks, poor WASH services, and an influx of refugees from Sudan, underscoring the urgent need for large-scale, multi-sectoral humanitarian assistance.

Ethiopia continues to face high levels of acute food insecurity, with millions of people classified in Crisis (IPC Phase 3) or worse, despite ongoing humanitarian assistance.⁷ Key drivers include conflict-related displacement, economic challenges, high food prices, and the impacts of climate shocks such as drought and desert locust infestations. Recent analyses indicate over 8 million people are in Crisis, with more than 1 million in Emergency (IPC Phase 4). Localised areas, particularly in Tigray and neighbouring regions, are experiencing extreme conditions and even a risk of famine. Vulnerable households continue to struggle to access food due to depleted stocks, limited income opportunities, and market disruptions, underscoring the urgent need for sustained humanitarian and livelihood support.

Kenya faces persistent food insecurity, particularly in the arid and semi-arid lands (ASALs), where 1.8 million people were classified in Crisis (IPC Phase 3) or worse between July and September 2025, including 179,000 in Emergency (IPC Phase 4).⁸ Although above-average rainfall earlier in the year improved crop and livestock production, conditions are projected to deteriorate during the October–December short rains due to forecasted below-average rainfall, rising staple food prices, and resource-based conflicts. By January 2026, an estimated 2.1 million people will face IPC Phase 3 or higher. Acute malnutrition remains a major concern, with over 740,000 children under five and 109,000 pregnant or lactating women requiring treatment, driven by food gaps, poor dietary intake, and limited access to health and WASH services.

Rwanda generally experiences Minimal (IPC Phase 1) or Stressed (IPC Phase 2) food security outcomes, reflecting relatively stable conditions compared with many neighbouring countries.⁹ However, pockets of vulnerability persist, particularly in rural areas affected by climatic variability, localised crop losses, and high food prices, which strain household purchasing power. Chronic food insecurity remains a concern, driven by structural challenges such as limited agricultural productivity and income diversification. While acute crises are less common, seasonal fluctuations and economic shocks can push poor households into Stressed conditions, underscoring the need for continued monitoring and resilience-building interventions.

Uganda faces significant food insecurity, with 2.46 million people classified in Crisis (IPC Phase 3) or worse between April and July 2025, including 45,000 in Emergency (IPC Phase 4).¹⁰ Although conditions are projected to improve to 1.42 million people in IPC Phase 3 or above from August 2025 to February 2026 due to expected strong harvests. Severe food gaps persist in Karamoja and parts of northern Uganda, where up to 45% of the population remains in Crisis. Key drivers include recurrent droughts, high food prices, low purchasing power, crop and livestock diseases, and resource-based conflicts. Acute malnutrition also remains a concern, with 428,000 children under five and 84,000 pregnant or lactating women requiring treatment. Refugee-hosting districts remain vulnerable, with nearly 797,000 refugees

⁶ <https://www.ipcinfo.org/ch/>

⁷ Ibid

⁸ Ibid

⁹ Ibid

¹⁰ Ibid

facing IPC Phase 3 or worse, underscoring the need for sustained food and livelihood assistance and resilience-building interventions.

Tanzania exhibits moderate food insecurity, with 466,000 people (10%) in Crisis (IPC Phase 3) between February and May 2025, improving to 242,000 (5%) projected for June–October 2025 due to favourable rainfall and harvests. While the latest IPC update does not extend beyond October, risks persist from high food prices, dry spells, and crop/livestock diseases.

Prevalence of Insufficient Food Consumption

Overall, the total number of people facing Insufficient Food Consumption (IFC) remained at 45.3 million across the five East African countries in October unchanged from September (Table 3). However, there are significant disparities in the IFC across these countries, with notable year-over-year and two-year trends. Uganda recorded the highest number and sharpest increase in affected individuals, 18 million, which is 35% of its population, marking a 127.9% compared to the previous year, signalling a rapidly worsening food security crisis. South Sudan though smaller in population, has the highest proportion affected (40.2%), highlighting its chronic vulnerability; this reflects an 11.4 increase from last year and 25.6% from two years ago. Rwanda also faces increasing food insecurity: 29.3% of its population has insufficient food, up 38.5% year-on-year and 16.1% over two years, indicating deteriorating conditions. Kenya's 23.6% affected rate has remained stable compared to last year but is up 12.4% over two years. Tanzania has the lowest proportion at 7.4%, with just a 4% rise over two years and no change from last year, suggesting relatively strong or stable food security compared to its neighbours.

Table 3: Prevalence of Insufficient Food Consumption across selected East African countries (October 2025)¹¹

Country	Total Population (millions)	People with insufficient food consumption (millions)*	People with insufficient food consumption (millions)**	Percentage of total population with insufficient food for consumption (%)	Change in people with insufficient food consumption from previous month (%)	Change in people with insufficient food consumption from 1yr ago (%)	Change in people with insufficient food consumption from 2yrs ago (%)
Kenya	51.40	13.60	13.60	23.64	0.00	●	13.60 ↑ 7.09 ↗
Rwanda	12.30	3.60	3.60	29.27	0.00	●	3.60 ↗ 5.88 ↗
South Sudan	11.00	4.90	4.90	40.20	0.00	●	4.90 ↗ 40.00 ↑
Tanzania	56.30	5.20	5.20	7.37	0.00	●	5.20 ↗ 26.83 ↑
Uganda	42.70	18.00	18.00	35.03	0.00	●	18.00 ↑ 127.85 ↑

*Current month and **Previous month

Commodity Prices

Key drivers of commodity prices in EA

	Conflicts	Conflicts and insecurity persist, particularly in South Sudan and Ethiopia, hindering effective price stability and trade flows.
	Seasonal Dynamics	Above average rainfall in some areas such as Uganda resulted to rising of Nile River water levels affecting crops in 13 counties across four states hence affecting prices.
	Macroeconomic Shocks	South Sudan continues to experience high prices due to poor macroeconomic conditions, currency depreciation, and trade disruptions.

¹¹ Author's construction based on WFP HungerMap Live

Maize

Figure 6: National average price spreads for maize across select East African Countries¹²

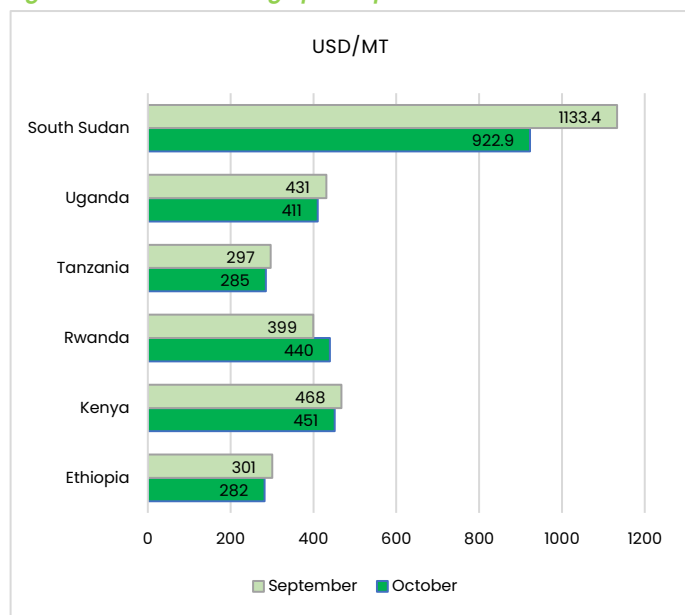


Figure 6 presents maize prices (in USD per metric tonne) across six Eastern African countries, highlighting notable month-on-month changes between September and October 2025. Most markets recorded price declines, except for **Rwanda**, which experienced a modest 10% increase to USD 440/MT, primarily driven by below-average seasonal harvests. **South Sudan** reported the highest regional prices at USD 923/MT, despite a significant 20% month-on-month decrease, as per data from the [World Food Programme \(WFP\)](#), highly attributed to increase in supply amidst the ongoing conflicts which has disrupted market dynamics. **Kenya** followed, with maize prices at USD 451/MT in October—a 4% decline from the previous month, according to the Ministry of Agriculture and Livestock Development ([KAMIS](#)). The decrease was supported by improved supply from the ongoing major harvest season in unimodal production areas. **Ethiopia** recorded the lowest maize prices in the

region at USD 282/MT, down 6% month-on-month decline – making it the lowest in the region, driven by improved supply following the recent harvests. **Tanzania** follows closely at USD 285/MT due to increase in supply in the region. Meanwhile, **Uganda** recorded a sharp 5% month-on-month decrease to USD 411/MT, largely driven by higher domestic supply from the first-season harvest.¹³

Table 4 summarises maize prices in local currency across East African countries, broadly mirroring the trends observed in USD-denominated prices. Most markets recorded month-on-month declines, except for **Rwanda**, where prices rose by 10.5%. Current prices in Rwanda remain elevated—11% and 18.37% higher compared to the average prices over the past three and six months, respectively due to seasonal harvest variations. In **Ethiopia**, maize prices declined slightly by 0.79% month-on-month and 3.32% decrease over the past three months yet remain 15.48% higher than six months ago and 2.52% above last year's levels, signalling a short-term easing following recent harvests and increased use of maize in humanitarian assistance programmes in place of wheat¹⁴.

In **Kenya**, maize prices fell by 3.63% month-on-month and 13.48% over three months, supported by ongoing harvests, though prices remain 16.06% higher year-on-year, reflecting structural market inefficiencies and localised production challenges. **South Sudan** saw the sharpest decline with prices dropping by 19.11% month-on-month and 11.20% over three months due to local harvests and Ugandan imports. However, prices remain 14.44% higher than six months ago and 41% year-on-year, reflecting persistent macroeconomic challenges, supply constraints, and conflict-driven disruptions.

Lastly, **Tanzania's** maize prices fell by 3.45% month-on-month, 12.5% over three months, and 15.15% over six months, driven by increased supply from *Masika* and *Msimu* harvests gathered in northeastern bimodal rainfall areas and central and southern unimodal zones. Despite these short-term drops, prices remain 16.67% higher year-on-year due to localised production shortfalls compared to the previous bumper harvest. This trend underscores the impact of seasonal variability and the need for improved storage and distribution systems to promote greater market stability

¹² These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

¹³ September FPMA Report [Food Price Monitoring and Analysis \(FPMA\) Bulletin #7, 11 September 2025](#)

¹⁴ FEWSNET Global Price Watch September 2025 Prices

Table 4: Percentage changes in maize prices in East Africa¹⁵

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Ethiopia	White Maize (Quintal)	National average, Retail, ETB/100kg	4,302.38	-0.79 ↘	-3.32 ↘	15.48 ⓧ	2.52 ▲
Kenya	Maize	National Average, Retail, KES/KG	57.87	-3.63 ↘	-13.48 ↓	-6.69 ↓	16.06 ⓧ
Rwanda	Maize	National Average, Retail, RWF/Kg	636.24	10.55 ↑	11.03 ↑	18.37 ⓧ	
South Sudan	Maize (white)	National Average, Retail, SSP/Kg	4,190.01	-19.11 ↓	-11.20 ↓	14.44 ↑	41.09 ⓧ
Tanzania	Maize (Mahindi)	National Average, Wholesale, TZS/100KG	70,000.00	-3.45 ↘	-12.50 ↓	-15.15 ↓	16.67 ⓧ
Uganda	Maize (flour)	National Average, Retail, UGX/Kg*	2,501.57	-3.14 ↘	-12.41 ↓	4.82 ▲	-6.04 ↓
Uganda	Maize (white)	National Average, Retail, UGX/Kg*	1,418.52	-5.05 ↓	-22.37 ↓	1.84 ▲	29.70 ⓧ

Note: Last price is for October 2025, * September 2025, and ** August 2025

● = no change, ▲ = low increase (0–5%), ↑ = moderate increase (5–15%), ⓧ = high increase (>15%),
 ↘ = low decrease (0–5%), ↓ = moderate decrease (5–15%), ↓ = high decrease (>15%)

Rice

Figure 7: National average price spreads for rice across select East African Countries¹⁶

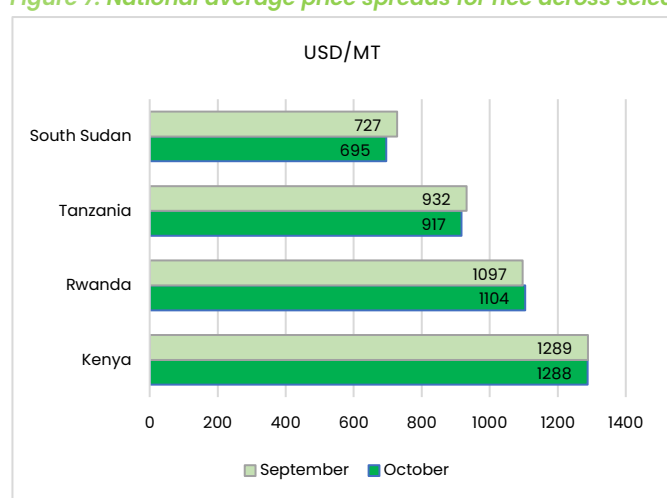


Figure 7 illustrates month-on-month stability and decline in rice price trends (in USD) across four Eastern African countries highlighting a regional trend of easing rice price pressures driven by improved supply and recent harvests.

South Sudan experienced the sharpest decline, with prices falling to USD 695/MT, marking a 5% slump attributed to increased domestic availability and humanitarian inflows, likely sourced from major exporters such as Pakistan—These imports have temporarily eased market pressures, despite ongoing conflict and logistical challenges. Similarly, **Tanzania** recorded a 2% decline to USD 917/MT driven by increased harvests. In contrast, **Rwanda** saw a slight 1% increase to USD 1,104/MT, suggesting relatively stable market conditions with mild inflation. **Kenya** maintained the

highest rice prices in the region, with prices remaining stable in the range of USD 1288/MT, reflecting a mature market, influenced by poor crop harvests, import dependency and higher consumer demand. These movements underscore the need for close monitoring of supply chains and regional coordination to manage food price inflation and ensure affordability.

The local currency price movements (**Table 5**) broadly aligned with USD-denominated trends, reflecting a general decline in rice prices, though with varying intensities across markets and timeframes. **South Sudan** recorded the steepest changes, with rice prices falling by 5.03% month-on-month yet remain significantly elevated by 46.46% year-on-year driven by acute long-term supply constraints, logistics challenges, currency depreciation and inflationary pressures. Similarly, **Kenya** recorded a slight 0.10% month-on-month decline, attributed to a modest increase in supply from recent harvests though prices remain moderately high, up 0.92% over three months and 6.27% year-on-year. Conversely, **Rwanda's** rice prices rose by 1.08% month-on-month and 6.5% over six months, indicating firm inflationary pressures and limited domestic stock availability. Following a recent uptick in rice prices, **Tanzania** recorded a low to moderate decline this month, ranging between 1.1% and 8.16% compared to the previous one to six months. However, prices remain 12.5% higher year-on-year, suggesting limited current supply due to seasonal harvest variability. Overall, rice prices across the region demonstrate short-term easing, but longer-term volatility persists.

¹⁵ Author's construction based on 1) FAO data for Rwanda, South Sudan & Uganda, 2) National MIS Ethiopia, Kenya & Tanzania

¹⁶ These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

Table 5: Percentage changes in rice prices in East Africa¹⁷

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Kenya	Rice	National Average, Retail, KES/KG	165.31	-0.10 ▾	1.69 ▲	0.92 ▲	6.27 ↑
Rwanda	Rice	National Average, Retail, RWF/Kg	1,597.33	1.08 ▲	6.83 ↑	6.49 ↑	
South Sudan	Rice	National Average, Retail, SSP/Kg	3,156.00	-5.03 ▾	12.72 ↑	11.40 ↑	46.46 ✖
Tanzania	Rice (Mchele)	National Average, Wholesale, TZS/100KG	225,000.00	-1.10 ▾	-3.23 ▾	-8.16 ▾	12.50 ↑

Note: Last price is for September 2025, * August 2025, and ** July 2025

● = no change, ▲ = low increase (0–5%), ↑ = moderate increase (5–15%), ✖ = high increase (>15%),
 ▾ = low decrease (0–5%), ▾ = moderate decrease (5–15%), ▾ = high decrease (>15%)

Beans

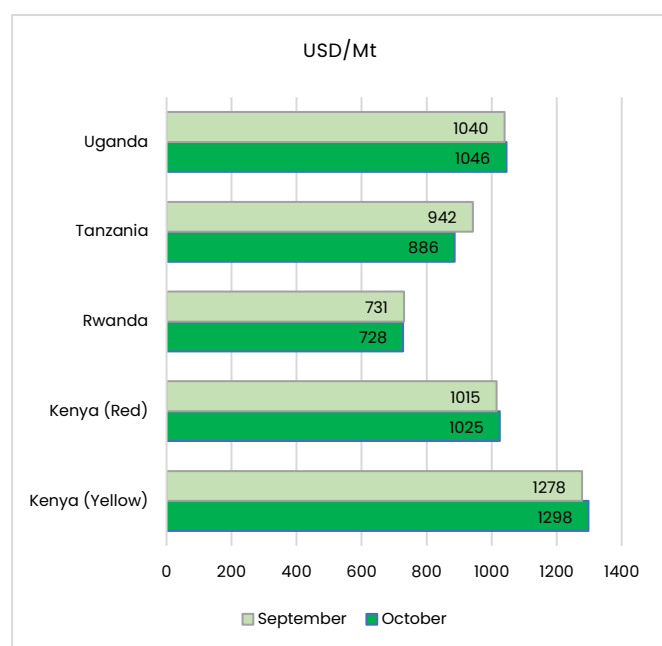


Figure 8: National average price spreads for beans across select East African Countries¹⁸

Figure 8 highlights a mixed market dynamics in bean prices across four East African countries, with most markets experiencing a slight month-on-month upticks signalling emerging market pressures. **Uganda** recorded a slight price increase (0.6% to USD 1,046/MT), likely driven by tightening supply and rising regional demand. In **Kenya**, the red beans were priced at USD 1,025/MT, reflecting a 1% month-on-month increase, while yellow beans reached USD 1,298/MT, rising by 1.6%. The prices of both types of beans are showing slight price increases as a result of reduced market supplies as stocks from previous harvests are reducing while demand for household consumption remains steady. Conversely, **Rwanda** saw a slight price decline of 0.4% month-on-month to USD 728/MT, making it the lowest priced rice in the region. In **Tanzania**, prices have also moderately declined by 6% month-on-month, because of increased supply from recent harvest.

Table 6 shows mixed trends in bean prices across selected East African markets, with a general downward trend over the medium to long term, reflecting improved supply conditions in most markets. In **Kenya**, both Yellow-Green and Red Haricot beans recorded slight month-on-month increases of 1.55% and 1.02%, respectively, suggesting mild supply tightening or increased demand. However, prices remain significantly lower than six months ago, down by 11.31% and 7.41%, and by 10.07% and 5.64% year-on-year respectively, indicating overall market stability following previous harvests. **Rwanda's** bean prices remained largely stable month-on-month (–0.02%) but rose sharply by 7.58% over the past three months, signalling inflationary pressure and limited stock replenishment despite a slight six-month decline (–2.79%). **Tanzania** posted the steepest declines across all timeframes, with prices dropping by 5.43% month-on-month and 20.91% over six months, reflecting strong supply availability and possibly reduced export demand. Uganda recorded marginal month-on-month uptick (0.19%) but notable declines over three and six months (–11.40% and –6.03%), while remaining slightly higher year-on-year (0.98%), pointing to seasonal variability and localised supply constraints. Overall, bean prices in the region show short-term stability with isolated increases, but longer-term trends indicate easing price pressures driven by improved harvests and regional supply flows.

¹⁷ Author's construction based on 1) FAO data for Rwanda, 2) National MIS Kenya & Tanzania

¹⁸ These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

Table 6: Percentage changes in bean prices in East Africa¹⁹

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Kenya	Beans (Yellow-Green)	National Average, Retail, KES/KG	166.58	1.55 ▲	2.60 ▲	-11.31 ▼	-10.07 ▼
Kenya	Beans Red Haricot (Wairimu)	National Average, Retail, KES/KG	131.60	1.02 ▲	3.09 ▲	-7.41 ▼	-5.64 ▼
Rwanda	Beans	National Average, Retail, RWF/Kg	1,052.50	-0.02 ▾	7.58 ▲	-2.79 ▾	
Tanzania	Beans (Maharage)	National Average, Wholesale, TZS/100KG	217,500.00	-5.43 ▼	-11.22 ▼	-20.91 ▼	-19.44 ▼
Uganda	Beans	National Average, Retail, UGX/Kg*	3,611.91	0.19 ▲	-11.40 ▼	-6.03 ▼	0.98 ▲

Note: Last price is for September 2025, * August 2025, and ** July 2025

● = no change; ▲ = low increase (0-5%), ▲ = moderate increase (5-15%), ☒ = high increase (>15%),
 ▾ = low decrease (0-5%), ▼ = moderate decrease (5-15%), ▼ = high decrease (>15%)

Wheat

Figure 9: National average price spreads for wheat across select East African Countries

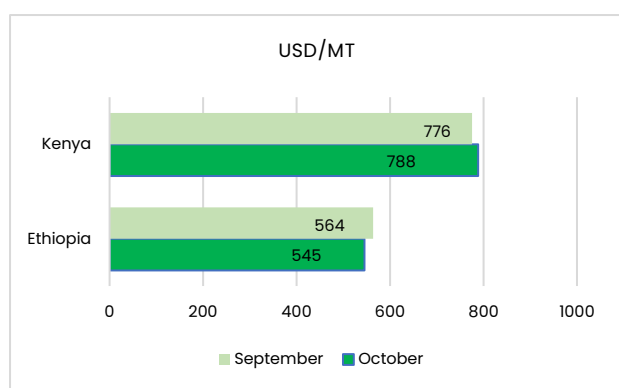


Figure 9 presents wheat price trends (in USD) for Ethiopia and Kenya in October 2025, showing mixed movements across the two markets. **Kenya** recorded a slight 2% month-on-month increase, reaching USD 788/MT, largely driven by stock depletion amid sustained domestic demand. Conversely, **Ethiopia** posted a moderate 4% decline to USD 545/MT, primarily attributed to local currency depreciation against the US dollar, with the exchange rate widening to ETB 152.8 per USD, exerting downward pressure on dollar-denominated prices.

Table 7 highlights mixed price movements of wheat in local currencies for the two select East African markets with varying dynamics.

In **Ethiopia** current prices remain consistently elevated across all timeframes, with white wheat rising by 2.47% month-on-month and maintaining an upward trajectory over the past three months (+6.68%), six months (+10.59%), and a significant 13.41% year-on-year gain.

This persistent surge underscores strong inflationary pressures, likely driven by currency depreciation and stock depletion due to ongoing regional export demand. In contrast Kenya's wheat prices showed a modest 1.60% month-on-month increase and a slight 1.74% rise over three months. However, prices declined by 5.16% over six months, despite remaining 6.12% higher year-on-year. These movements indicate short-term price pressure linked to stock depletion amid steady domestic demand, while longer-term volatility reflects seasonal harvest variabilities and inflationary pressures. Overall, Kenya's wheat market demonstrates relative stability with intermittent price corrections, contrasting Ethiopia's consistent upward trajectory driven by structural supply constraints and macroeconomic challenges.

Table 7: Percentage changes in wheat prices in East Africa²⁰

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Ethiopia	White Wheat (Quintal)	National average, Retail, ETB/100kg	8,328.10	2.47 ▲	6.68 ▲	10.59 ▲	13.41 ▲
Kenya	Wheat	National Average, Retail, KES/KG	101.17	1.60 ▲	1.74 ▲	-5.16 ▼	6.12 ▲

Note: Last price is for September 2025, * August 2025, and ** July 2025

● = no change; ▲ = low increase (0-5%), ▲ = moderate increase (5-15%), ☒ = high increase (>15%),
 ▾ = low decrease (0-5%), ▼ = moderate decrease (5-15%), ▼ = high decrease (>15%)

¹⁹ Author's construction based on 1) FAO data for Rwanda & Uganda, 2) National MIS Kenya & Tanzania

²⁰ Author's construction based on 1) FAO data for Rwanda, South Sudan & Uganda, 2) National MIS Ethiopia, Kenya & Tanzania

Fertiliser

Table 8 shows significant upward movements in fertiliser prices across Kenya and Rwanda in October 2025, with variations by product and timeframe. In **Kenya**, CAN fertiliser recorded the sharpest month-on-month increase (+14.26%), while DAP and NPK rose by 2.87% and 5.70% respectively, supported by strong medium-term gains, particularly for NPK (+17.05% over six months). In **Rwanda**, price surges were more pronounced, with NPK jumping 19.95% month-on-month and posting steep increases over three and six months (+28.10% and +27.96%), underscoring acute supply shortages and import dependency. Urea also rose modestly (+2.13% month-on-month) but maintained upward pressure over the medium term. Overall, fertiliser markets in the region face short-term volatility and sustained inflationary trends, driven by global supply chain disruptions, currency depreciation, and high import costs, posing risks to production affordability and food security.

Table 8: Percentage changes in fertiliser prices in East Africa²¹

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Kenya	Fertilizer (CAN)	National Average, Retail, KES/KG	77.16	14.26 ↑	-1.32 ▾	9.32 ↑	-15.60 ↓
Kenya	Fertilizer (DAP)	National Average, Retail, KES/KG	121.39	2.87 ▲	5.30 ↑	20.42 ×	0.64 ▲
Kenya	Fertilizer (NPK)	National Average, Retail, KES/KG	106.35	5.70 ↑	5.84 ↑	17.05 ×	11.17 ↑
Rwanda	NPK	National Average USD/50kg	956.37	19.95 ×	28.10 ×	27.96 ×	
Rwanda	Urea	National Average USD/50kg	808.13	2.13 ▲	8.14 ↑	8.97 ↑	

Note: Last price is for September 2025, * August 2025, and ** July 2025

● = no change, ▲ = low increase (0-5%), ↑ = moderate increase (5-15%), × = high increase (>15%),

▾ = low decrease (0-5%), ▽ = moderate decrease (5-15%), ↓ = high decrease (>15%)

Seasonal Monitor and Cropping Conditions²²

Cereal crop conditions across **East Africa** are mixed, with planting and early development of second-season cereals underway amid concerns over continued below-average rainfall during the October–December period. In **Ethiopia**, harvesting of *Meher* season cereals is ongoing, with generally favourable prospects following adequate June–September *Kiremt* rains across key cropping areas.

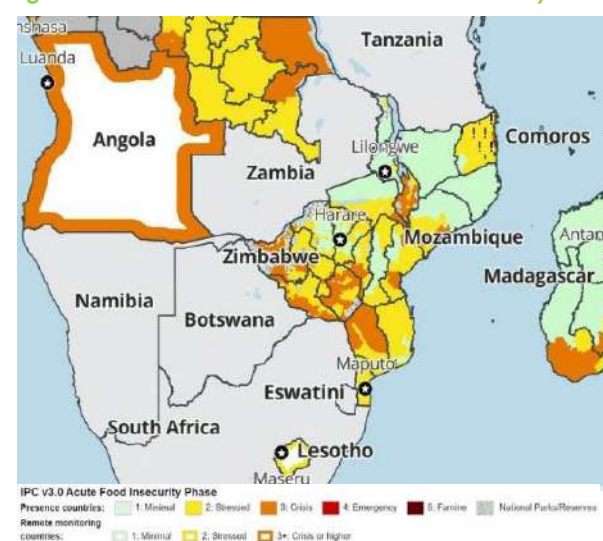
In **Kenya**, harvesting of long rains cereals is ongoing in western regions under favourable conditions, although continued rainfall may cause post-harvest losses. Meanwhile, rice crops are developing well in central and western regions, and short rains maize planting has begun nationwide under mixed conditions. In **Uganda**, first season cereal harvesting is nearly complete in the unimodal north under favourable conditions, while delayed rains in bimodal regions are raising concerns for second season maize development. In **Rwanda** and **Burundi**, Season A maize planting is ongoing, though drier-than-normal conditions are affecting the start of the season. In **Tanzania**, planting of Vuli season maize and sorghum is underway amid continued dry conditions and election-related unrest, which may impact agricultural activities. In **South Sudan**, harvesting of 2025 crops has just begun, but yields are expected to be below average due to early-season rainfall deficits followed by heavy rains that failed to fully recover affected areas and worsened flooding along the Nile and its tributaries.

²¹ Author's construction based on 1) AfricaFertiliser.org for Ethiopia & Rwanda, 2) National MIS for Kenya

²² Crop Monitor No. 110 – November 2025: [EarlyWarning_CropMonitor_202511.pdf](#)

Southern Africa Food Security Update

Figure 10: Southern Africa Countries Food Security Outlook, October 2025



Southern **Malawi** and parts of central Malawi are expected to face Crisis (IPC Phase 3) food security outcomes during the January–March 2026 lean season due to depleted household food stocks following a below-average 2025 harvest, exceptionally high food prices, and reduced agricultural labour demand, which will erode purchasing power and limit market access.²³ In contrast, most central and northern districts are projected to experience Stressed (IPC Phase 2) or Minimal (IPC Phase 1) outcomes, supported by own-produced food and income from tobacco sales and agricultural labour. Southern Malawi remains the area of greatest concern, with widespread Crisis outcomes in districts such as Neno, Mwanza, Blantyre, Thyolo, Mulanje, Phalombe, Chikwawa, and Nsanje, where poor households increasingly rely on market purchases amid constrained purchasing power.

Mozambique faces worsening food insecurity, with 2.09 million people in Crisis (IPC Phase 3) or worse between April and September 2025, including 143,000 in Emergency (IPC Phase 4).²⁴ The situation is projected to deteriorate during October 2025–March 2026, when 2.67 million people are expected to face IPC Phase 3 or higher, driven by early depletion of household food stocks, irregular rainfall, high food prices, and lingering insecurity in Cabo Delgado. Although conflict has eased in some northern areas, sporadic attacks and displacement continue to undermine recovery, leaving many households reliant on humanitarian assistance and unable to resume sustainable livelihoods.

Zambia's food security situation has improved compared to 2024 but remains concerning, with 1.7 million people (17% of the analysed population) projected to face Crisis (IPC Phase 3) or worse between October 2025 and March 2026, up from 1.2 million during May–September 2025.²⁵ This includes 9,900 people in Emergency (IPC Phase 4), mainly in Western Province districts such as Mitete, Shang'ombo, and Sikongo. Despite recovery from the severe drought of 2024, rural livelihoods remain under stress due to consecutive poor rainfall seasons, high input costs, and rising food prices, forcing households to adopt negative coping strategies. Urgent humanitarian assistance is needed to reduce food gaps, protect livelihoods, and prevent acute malnutrition, particularly in the 43 hotspot districts projected to remain in IPC Phase 3 or above.

Zimbabwe is experiencing significant food insecurity, with 2.61 million people (27% of the analysed rural population) currently in Crisis (IPC Phase 3) or worse, and an additional 2.9 million (29%) in Stressed (IPC Phase 2).²⁶ The main drivers include poor rainfall and below-average harvests, compounded by consecutive poor agricultural seasons, high food prices, and reduced income opportunities. Many households have depleted food stocks and rely heavily on markets amid constrained purchasing power. Humanitarian assistance remains critical to prevent further deterioration, as projections indicate continued vulnerability through the lean season unless large-scale support persists.

Prevalence of Insufficient Food Consumption

Table 9 below provides a snapshot of insufficient food consumption (IFC) across Malawi, Mozambique, Zambia, and Zimbabwe as of October 2025, with less than 30% of each country's population affected and no change from the previous month. A total of 22.2 million people are estimated to be food-insecure in these countries, reflecting a slight improvement from the previous year (23.4 million people), primarily due to progress in Zimbabwe. Malawi has the highest percentage affected (30.6%) and has experienced a sharp increase of 33.3% in IFC over two years, signalling worsening conditions and an urgent need for intervention. Mozambique, with 21.3% of the population affected, saw a decline in IFC over both one and two years, with a notable 13.6% reduction from two years ago, indicating steady improvement. Zambia, despite 15.1% of its population facing IFC, has made significant strides with a 26.7% decrease in

²³ <https://fews.net/southern-africa/malawi>

²⁴ <https://www.ipcinfo.org/ch/>

²⁵ Ibid

²⁶ Ibid

affected individuals over two years, demonstrating notable recovery. Zimbabwe, although showing the largest one-year improvement (a 21% reduction), has 26.6% of its population experiencing IFC and a moderate long-term deterioration, i.e. a 4.3% increase over two years.

Table 9: Prevalence of insufficient food consumption in selected Southern African Countries (October 2025)²⁷

Country	Total Population (millions)	People with insufficient food consumption (millions)*	People with insufficient food consumption (millions)**	Percentage of total population with insufficient food for consumption (%)	Change in people with insufficient food consumption from previous month (%)	Change in people with insufficient food consumption from 1yr ago (%)	Change in people with insufficient food consumption from 2yrs ago (%)
Malawi	18.10	6.80	6.80	30.60	0.00	6.80	33.33
Mozambique	29.50	7.60	7.60	21.33	0.00	7.60	-13.64
Zambia	17.40	3.30	3.30	15.06	0.00	3.30	-26.67
Zimbabwe	15.20	4.50	4.50	26.55	0.00	5.80	-4.26

*Current month and **Previous month

● = no change; ↗ = low increase (0-5%), ↗ = moderate increase (5-15%), ↗ = high increase (>15%),
 ↘ = low decrease (0-5%), ↘ = moderate decrease (5-15%), ↘ = high decrease (>15%)

Commodity Prices

Key drivers of prices in the Southern Africa region

	Seasonality Patterns	Most Southern African countries are experiencing seasonal declines and stability in grain prices as the harvest season concludes despite the expected below-average harvests.
	Weather Shocks	The aftermath of the cyclone, drought shocks, and heavy flooding early in the planting season led to below-average harvests from the previous season, resulting in higher food prices.
	Macroeconomic Shocks	Poor macroeconomic conditions caused by forex shortages, power shortages, high food inflation, and high debt repayments sustain higher food prices.

Maize

Figure 11: National average price spreads for maize across select Southern African Countries²⁸

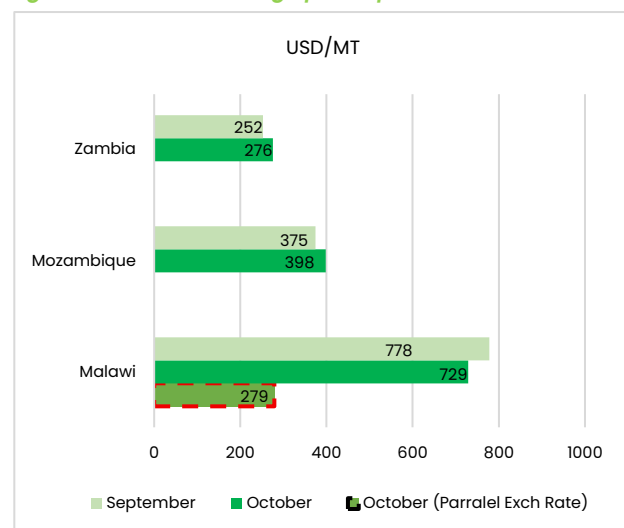


Figure 11 illustrates mixed price movements (in USD) for maize across Zambia, Mozambique, and Malawi between September and October. **Zambia** and **Mozambique** recorded month-on-month price increases of 9% and 6%, reaching USD 276/MT and USD 398/MT, respectively. These increases likely reflect stock depletion following an above-average main season harvest earlier this year. In contrast, **Malawi** recorded a 6% decline in maize prices to USD 729/MT based on the official exchange rate, but the price drops further to USD 279/MT when adjusted for the parallel market rate²⁹. This disparity reflects the ongoing foreign exchange crisis, which has strained the economy and led the Government to maintain a fixed exchange regime. The recent price drop also follows the Government's agreement³⁰ to import 200,000 MT of maize from Zambia, worth USD 76 million, to help ease domestic price pressures.

Table 10 highlights maize prices across Southern Africa, showing mixed movements over the past month, reflecting varying market dynamics and macroeconomic conditions. **Malawi** recorded a notable 6.4% decline in maize prices to MWK 1,255.50/kg, despite prices remaining high compared with the past three and six months by 11.6% and 33.96%, respectively. This recent drop likely signals short-term relief following government interventions, such as the maize import deal with Zambia, amid persistent foreign exchange constraints. Conversely, **Mozambique** posted a 6.26% increase in maize prices to MZN 25.16/kg over the past month, maintaining an exceptionally high level – 63.33% above prices three months ago. However, prices remain slightly lower compared with six months earlier (-11.65%), indicating

²⁷ Author's construction based on HungerMap

²⁸ These price spreads are calculated based on online rates at: <https://www.oanda.com/currency-converter/en>

²⁹ Estimated Exchange rate of 1USD: 4500MWK

³⁰ [Zambia: Malawi, Zambia Signs a Landmark Maize Procurement Deal - allAfrica.com](https://www.allafrica.com/stories/202509250001.html)

recent supply tightening after a period of relative stability. This surge reflects seasonal demand pressures and possible constraints in cross-border trade flows.

In **Zambia**, maize prices increased marginally by 1.44% to ZMW 6.07/kg over the past month and remain moderately higher—by 6.6%—compared with three months ago, suggesting emerging stock depletion following the above-average main season harvest earlier in the year. **Zimbabwe** presents slightly contrasting trends: maize grain prices in Epworth surged dramatically by 32.29% month-on-month to USD 0.98/kg, despite being marginally higher by 1.14% compared with the three months ago and broadly unchanged from six months earlier. This sharp rise points to acute local supply shortages. Meanwhile, maize meal prices in Bulawayo also increased by 7.68% to USD 0.84/kg, though longer-term trends remain negative (-10.82% over past six months), suggesting consumer-level price adjustments amid broader inflationary pressures.

Overall, the data highlights significant regional disparities driven by currency volatility, trade policies, and supply shocks. Malawi's forex crisis and Mozambique's sharp quarterly increases contrast with Zambia's relative stability and Zimbabwe's localised price spikes, underscoring the complexity of maize market dynamics in Southern Africa.

Table 10: Percentage changes in maize prices in Southern Africa³¹

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Malawi	Maize	National Average, MWK/Kg	1,255.50	-6.40 ↓	11.60 ↑	33.96 ⓧ	1.62 ▲
Mozambique	Maize (white)	National Average, Maize (white), MZN/Kg	25.16	6.26 ↑	63.33 ⓧ	-11.65 ↓	
Zambia	Maize (white)	National Average, Retail, Kwacha/KG	6.07	1.44 ▲	6.60 ↑	-33.02 ↓	-28.99 ↓
Zimbabwe	Maize	Epworth, USD/kg*	0.98	32.29 ⓧ	1.14 ▲	0.00 ●	18.61 ⓧ
Zimbabwe	Maize meal	Bulawayo, USD/kg*	0.84	7.68 ↑	0.60 ▲	-10.82 ↓	1.69 ▲

Note: Last price is for September 2025, * August 2025, and ** July 2025

● = no change, ▲ = low increase (0-5%), ↑ = moderate increase (5-15%), ⓧ = high increase (>15%),
 ▼ = low decrease (0-5%), ↓ = moderate decrease (5-15%), ↓ = high decrease (>15%)

Rice

Figure 12: National average price spreads for Rice across select Southern African Countries

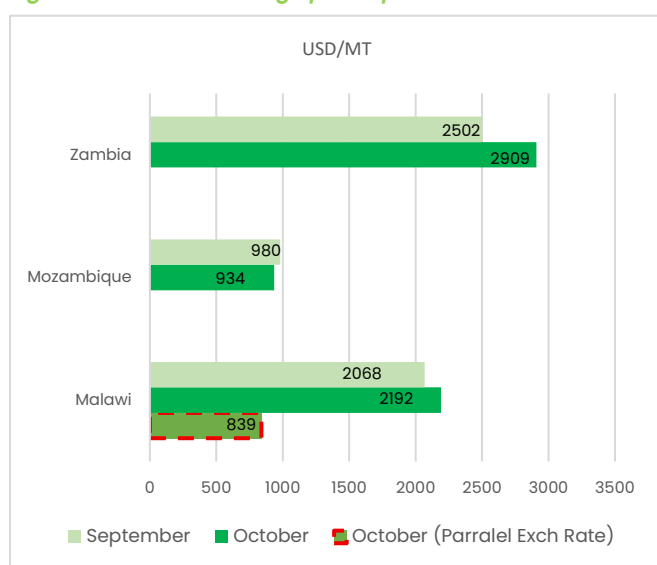


Figure 12 highlights national average rice prices across Zambia, Mozambique, and Malawi, showing mixed movements between September and October. **Zambia** recorded the sharpest increase in imported rice³², with prices rising to USD 2,909/MT, a 16.3% month-on-month surge, reflecting tightening supply and seasonal demand pressures. **Mozambique** saw a slight decline, with prices easing to USD 934/MT, representing a 4.7% decrease, likely due to improved availability or stable import flows. In **Malawi**, rice prices rose to USD 2,192/MT in October, a 6% increase based on the official exchange rate. However, when adjusted for the parallel market rate, prices drop sharply to USD 839/MT, underscoring the significant impact of foreign exchange distortions on real market values. The official price increase also reflects tightening supply conditions following below-average seasonal harvests earlier in the year. These

trends reveal contrasting dynamics: Zambia faces sharp price escalation, Mozambique shows mild relief, and Malawi's official prices remain high but are substantially lower in real terms under parallel exchange conditions.

As illustrated in **Table 11**, rice prices in local currency terms show a mixed movements over the past month and notable longer-term trends. Specifically, **Malawi** recorded a 5.84% increase in rice prices to MWK 3,775/kg over the past month, despite remaining moderate to significantly low by 8.30% over past three months, 4.39% over six months, and 41.24% year-on-year. This pattern suggests rice prices in Malawi remain relatively subdued compared with the last year, possibly due to improved supply conditions in the market. A key driver emerging from the country is the pressure from rice growers to liquidate stocks quickly to purchase maize, whose prices have been considerably higher in the market. This behaviour reflects shifting household and trader priorities toward maize, the staple grain, amid ongoing food security concerns. **Mozambique** saw a 4.69% decline in rice prices to MZN 59.04/kg month-on-month and a 13.46% decrease over six months, indicating relative market stability due to improved supply. **Zambia** experienced a 7.89%

³¹ Author's construction based on AGRA MIS data for Malawi and Mozambique, and FAO data for Zambia and Zimbabwe

³² Zambia Statistic Bulletin—October 2025 <https://www.zamstats.gov.zm/monthly-bulletin>

monthly increase in rice prices to ZMW 64/kg, despite longer-term contractions of -5.10% over three months and -6.30% over six months. However, prices remain 20.64% higher year-on-year, reflecting underlying inflationary pressures and possible import cost escalation. Finally, **Zimbabwe** recorded the most dramatic change, with rice prices in Epworth surging by 110.28% month-on-month to USD 2.25/kg, while remaining modestly higher over three months (+1.12%) and six months (+7.14%). Year-on-year, prices have also soared by 79.28%, signalling acute currency instability and localised supply shortages. Overall, these trends underscore contrasting dynamics across the region—ranging from subdued prices in Malawi and Mozambique to sharp volatility in Zimbabwe—driven by currency fluctuations, import dependencies, and shifting consumer priorities.

Table 11: Percentage changes in rice prices in Southern Africa³³

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Malawi	Rice	National Average, MWK/Kg	3,775.00	5.84 ↑	-8.30 ↓	-4.39 ↘	-41.24 ↓
Mozambique	Rice (imported)	National Average, MZN/Kg	59.04	-4.69 ↘	1.50 ▲	-13.46 ↓	
Zambia	Rice (imported)	National Average, Retail, Kwacha/KG	64.00	7.89 ↑	-5.10 ↓	-6.30 ↓	20.64 ⓧ
Zimbabwe	Rice	Epworth, USD/kg*	2.25	110.28 ⓧ	1.12 ▲	7.14 ↑	79.28 ⓧ

Note: Last price is for September 2025, * August 2025, and ** July 2025

● = no change, ▲ = low increase (0–5%), ↑ = moderate increase (5–15%), ⓧ = high increase (>15%),
 ↘ = low decrease (0–5%), ↓ = moderate decrease (5–15%), ↓ = high decrease (>15%)

Beans

Figure 13: National average price spreads for beans across select Southern African Countries

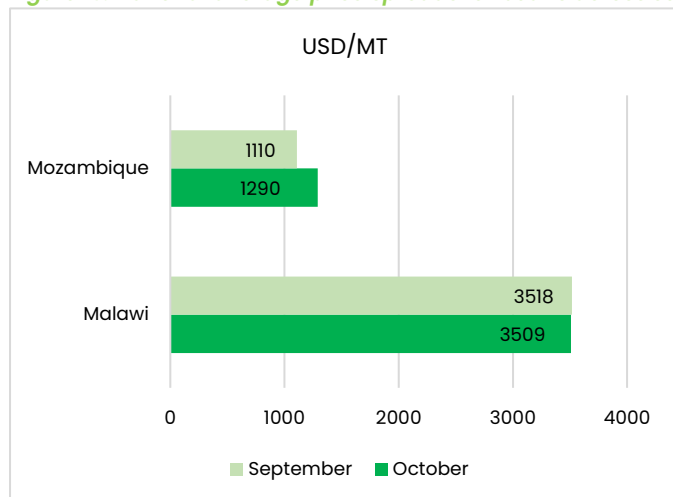


Figure 13 illustrates bean prices in USD/MT across selected Southern African countries. In **Mozambique**, prices rose significantly to USD 1,290/MT in October, a 16.3% increase driven by ongoing supply constraints and increased domestic demand pressures. In contrast, **Malawi** recorded a modest price change of 0.2% to USD 3,509/MT, indicating improved domestic availability. These divergent movements underscore localised market dynamics and have implications for food affordability in the region.

Similarly, **Table 12** further illustrates that local bean prices across Malawi, Mozambique, and Zimbabwe show mixed trends. In **Malawi**, bean prices declined slightly in the short term but remain 57.52% higher year-on-year due to poor 2024 harvests. Soyabean prices in Malawi are elevated

across all timeframes, driven by supply constraints and market dynamics. **Mozambique** saw a 16.29% month-on-month surge in bean prices, suggesting short-term supply tightening despite year-on-year stability. In **Zimbabwe**, bean prices dropped sharply month-on-month but remain 50% higher year-on-year, reflecting ongoing inflation and currency instability. These patterns highlight the need for regional monitoring of legume markets particularly in comparison with East African countries where prices are significantly lower—such as USD 728/MT in Rwanda. Price volatility in Southern Africa poses risks to household nutrition and the feed industry, especially under current macroeconomic challenges, emphasising the importance of coordinated trade and policy interventions to stabilise supply and affordability.

Table 12: Percentage changes in bean prices in Southern Africa³⁴

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Malawi	Beans	National Average, MWK/Kg	6,045.24	-0.35 ↘	-4.30 ↘	25.42 ⓧ	57.52 ⓧ
Malawi	Soyabeans	National Average, MWK/Kg	2,826.92	16.17 ⓧ	7.35 ↑	63.99 ⓧ	49.54 ⓧ
Mozambique	Beans	National Average, MZN/Kg	81.55	16.29 ⓧ	11.33 ↑	-7.44 ↓	
Zimbabwe	Beans	Epworth, USD/kg*	3.00	-27.88 ↓	1.35 ▲	0.00 ●	50.00 ⓧ

Note: Last price is for September 2025, * August 2025, and ** July 2025

● = no change, ▲ = low increase (0–5%), ↑ = moderate increase (5–15%), ⓧ = high increase (>15%),
 ↘ = low decrease (0–5%), ↓ = moderate decrease (5–15%), ↓ = high decrease (>15%)

³³ Author's construction based on AGRA MIS data for Malawi and Mozambique, and FAO data for Zambia

³⁴ Author's construction based on AGRA MIS data for Malawi and Mozambique, and FAO data for Zambia

Fertiliser

Fertiliser price trends in Malawi and Mozambique reflect diverging market conditions with implications for agricultural planning. In **Malawi**, NPK and urea prices dropped sharply month-on-month by 17.17% and 15.04%, respectively. Yet, NPK remains 31.11% higher year-on-year, while urea, though 41.1% lower year-on-year, is still up 13.55% and 33.39% compared to three and six months ago. In **Mozambique**, NPK eased slightly by 1.75% to MZN 69.96/kg, while urea rose by 1.01% to MZN 63.61/kg, with three- and six-month increases of up to 9.04%. These trends highlight persistent affordability challenges for farmers, with Malawi showing short-term relief but medium-term strain, and Mozambique facing steady upward pressure. Coordinated regional strategies are needed to stabilise input costs ahead of the planting season.

Table 13: Percentage changes in fertiliser prices in Southern Africa³⁵

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Malawi	NPK	National Average, MWK/Kg	3,321.33	-17.17 ↓	12.65 ↑	31.11 ×	5.85 ↑
Malawi	Urea	National Average, MWK/Kg	3,256.90	-15.04 ↓	13.55 ↑	33.39 ×	-41.10 ↓
Mozambique	NPK	National Average, MZN/Kg	69.96	-1.75 ↘	-0.41 ↘	19.94 ×	
Mozambique	Urea	National Average, MZN/Kg	63.61	1.01 ▲	3.62 ▲	9.04 ↑	

Note: Last price is for September 2025, * August 2025, and ** July 2025

● = no change, ▲ = low increase (0-5%), ↑ = moderate increase (5-15%), × = high increase (>15%),
 ↘ = low decrease (0-5%), ↓ = moderate decrease (5-15%), ↓ = high decrease (>15%)

Seasonal Monitor and Cropping Conditions

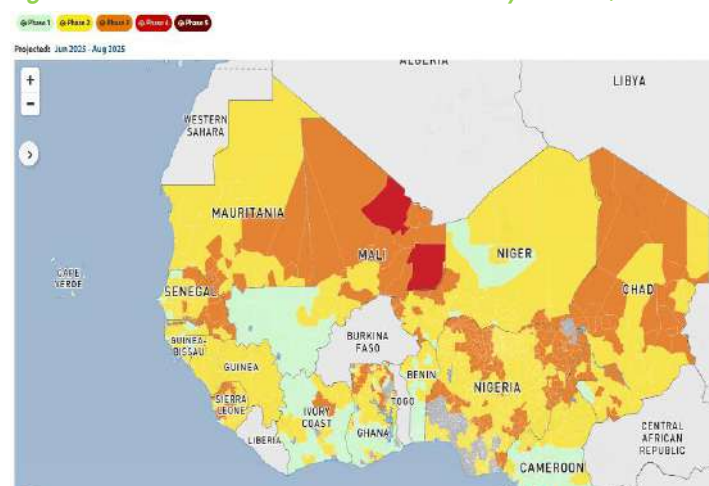
Across **Southern Africa**, land preparation for the 2025/26 main summer cropping season is underway, with planting already begun in most countries and seasonal rainfall expected to be generally favourable, particularly in central and southern areas where above-normal rainfall is likely. In **Malawi**, a state of catastrophe³⁶ has been declared in several central and southern districts due to the 2023/24 drought, rising commodity prices, and macroeconomic pressures. The government's response includes aid distribution and enhanced agricultural support, with an emphasis on expanding irrigation infrastructure. The October 2025 IPC analysis indicates that nearly 4 million people in Malawi are facing high levels of food insecurity, with approximately 8,000 individuals in emergency conditions. In **Zambia**, the main summer cropping season is underway with planting in progress. Wheat experienced a reduced planting area this season, though current yield prospects remain favourable. In **Mozambique**, average to above-average rainfall is expected through early 2026 due to the anticipated La Niña event, which is likely to support cereal production but also increases the risk of cyclone activity. Finally, wheat harvest in **Zimbabwe** is projected to reach a record 578,000 tonnes—exceeding last year's output and national consumption needs—marking full self-sufficiency, driven by increased planted area, expanded irrigation, and government support through input and mechanisation programmes.

³⁵ Author's construction based on 1) AfricaFertiliser.org for Ethiopia & Rwanda, 2) National MIS for Kenya

³⁶ [Malawi Declares National Disaster Amid Chronic Food Insecurity Crisis - Ecofin Agency](#)

West Africa Food Security Update

Figure 14: West African Countries Food Security Outlook, October 2025



Burkina Faso is expected to experience Crisis (IPC Phase 3) food security outcomes in several provinces during the upcoming lean season, driven by depleted household food stocks, high food prices, and insecurity that limits market access and humanitarian assistance. In contrast, some areas with better harvests and income sources will face Stressed (IPC Phase 2) outcomes, supported by own production and limited livelihood activities. The greatest concern remains in conflict-affected northern and eastern regions, where widespread displacement and restricted access to services are forcing poor households to rely heavily on markets amid severely constrained purchasing power.

Mali continues to face severe food security and nutrition challenges, with Crisis (IPC Phase 3) and Emergency (IPC Phase 4) outcomes persisting in conflict-affected northern and central regions. As of September–October 2025, internally displaced persons (IDP) sites in Gao remain of greatest concern. These sites were previously classified as Extremely Critical (IPC AMN Phase 5) and are now projected to remain in Critical (Phase 4) despite ongoing interventions. Acute malnutrition levels remain alarming, with nearly 1.6 million children under five and over 85,000 pregnant or breastfeeding women affected or at risk between June 2024 and May 2025. Key drivers include insecurity disrupting markets and health services, high food prices, and limited humanitarian access, forcing poor households to rely heavily on markets amid severely constrained purchasing power.

In October 2025, food security in **Niger** remained extremely fragile, with approximately 76.6% of the population facing insufficient food consumption. Crisis (IPC Phase 3) conditions persisted across conflict-affected regions due to ongoing insecurity, displacement, and high food prices, despite seasonal improvements from recent harvests. Projections indicate that most agropastoral and pastoral areas will transition to Stressed (IPC Phase 2) from October 2025 through early 2026 as households depend increasingly on markets and face elevated food costs, while conflict zones are likely to continue experiencing Crisis (IPC Phase 3) outcomes.

In October 2025, **Nigeria** continued to face severe food insecurity, with around 30.6 million people in Crisis (IPC Phase 3) or worse, mainly due to conflict, high food prices, and disruptions in agricultural production. While the main harvest from October to December is expected to bring temporary improvements in food availability and moderate prices, projections indicate that food insecurity will worsen again during the June–August 2026 lean season, when millions are likely to remain in need of emergency assistance.

Prevalence of Insufficient Food Consumption

Table 14 provides a detailed view of insufficient food consumption (IFC) across selected West African countries, highlighting major food insecurity and its trends. Niger stands out with the highest proportion affected, 76.7% of its population (21.4 million people), indicating a severe food crisis and chronic vulnerability, although this has remained stable over both the past year and two years. Mali also faces extreme food insecurity, with 52.4% of its population affected. Burkina Faso, at 46.5%, confronts similarly high rates, though both countries have seen almost no change over time, suggesting entrenched challenges. Nigeria has the largest absolute number of affected individuals (56.4 million), but the proportion is lower at 23.7%. Nigeria has made the most remarkable progress among these countries, reducing IFC by 35.3% over the past two years, which demonstrates substantial advancement in addressing food insecurity. Ghana, despite a moderate percentage affected (24%), has experienced a sharp two-year rise of 52.7%, signalling worsening conditions. Togo, at 27.8%, also shows a concerning long-term trend, a 42.1% increase in IFC over two years. Côte d'Ivoire maintains the lowest percentage (15.6%) among these countries and has seen a modest rise of 15.9% over two years, depicting relatively better food security but a need for vigilance.

Table 14: Prevalence of Insufficient Food Consumption in selected West African countries (October 2025)³⁷

Country	Total Population (millions)	People with insufficient food consumption (millions)*	People with insufficient food consumption (millions)**	Percentage of total population with insufficient food for consumption (%)	Change in people with insufficient food consumption from previous month (%)	Change in people with insufficient food consumption from 1yr ago (%)	Change in people with insufficient food consumption from 2yrs ago (%)
Burkina Faso	19.80	11.20	11.20	46.53	0.00	●	11.20 ↑ 0.00 ●
Cote d'Ivoire	29.40	5.10	5.10	15.59	0.00	●	5.10 ↗ 15.91 ↑
Ghana	29.80	8.40	8.40	23.96	0.00	●	8.40 ↗ 52.73 ↑
Mali	19.10	13.20	13.20	52.40	0.00	●	13.20 ↑ 0.00 ●
Niger	25.90	21.40	21.40	76.65	0.00	●	21.40 ↑ 0.94 ↗
Nigeria	202.80	56.40	56.40	23.74	0.00	●	101.40 ↑ -35.32 ↓
Togo	7.90	2.70	2.70	27.78	0.00	●	2.70 ↗ 42.11 ↑

*Current month and **Previous month

● = no change; ↗ = low increase (0-5%), ↑ = moderate increase (5-15%), ↑↑ = high increase (>15%),
 ↘ = low decrease (0-5%), ↓ = moderate decrease (5-15%), ↓↓ = high decrease (>15%)

Commodity Prices

Key drivers of the price movements in West Africa include.

	Insecurity & Armed Conflicts	Conflict, insecurity, and political tension in West Africa continue to disrupt agriculture, trade, and food assistance activities, resulting in higher food prices.
	Macroeconomic Challenges	Poor macroeconomic conditions, driven by high inflation rates, local currency depreciations and elevated fuel prices are pushing food prices upwards in some West African countries.
	Seasonal Dynamics	Seasonal changes in food supply, including the early onset of the lean season in most countries in West Africa, are putting upward pressure on food prices.

Maize

Figure 15: Price spreads for maize across select West African Countries³⁸

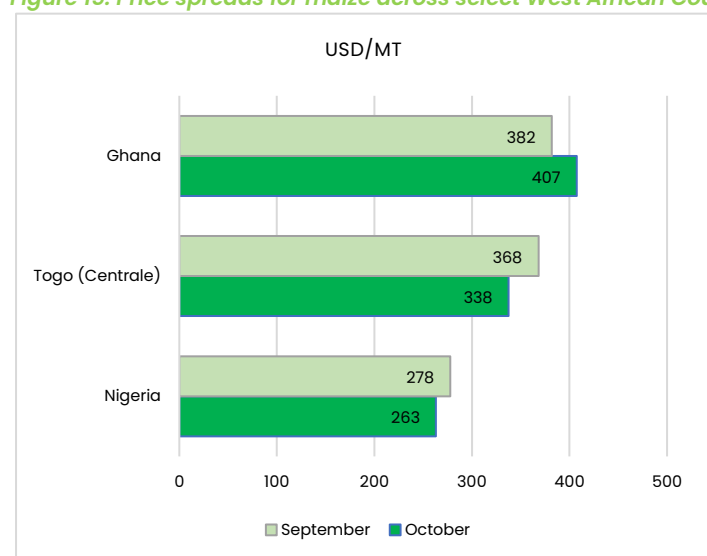


Figure 15 presents maize price trends in USD across selected West African countries, highlighting varied month-on-month movements. In **Ghana**, prices rose to USD 407/MT in October, marking a 6.7% increase, largely attributed to the appreciation of the local currency. Conversely, prices declined in **Togo** (Centrale) and **Nigeria**, falling by 8.3% and 5.3% to USD 338/MT and USD 263/MT, respectively. These declines suggest localised increases in market supply. In Nigeria, the reduction in prices is linked to a combination of factors, including import duty waivers on key cereals (such as maize, rice, and sorghum) and the release of stored grains by farmers and traders in anticipation of the upcoming harvest.

Table 15 highlights varied trends in maize prices in local currencies across three selected West African countries, exhibiting significant volatility. Most markets recorded sharp declines over the past month and year, except for one notable outlier. In **Ghana**, the national average fell 6.3% month-on-month and remains 36% lower year-on-year, driven by favourable harvests and government-backed grain purchases through NAFCO. Similarly, **Nigeria** reports a national average of NGN 381.39/kg, falling 7.5% in the past

³⁷ Author's construction based on WFP HungerMap Live

³⁸ These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

month, and comparatively lower by 14.4%, 25.3%, and 33.7% over three, six, and twelve months, respectively. This reflects the impact of the government's import duty waiver on key cereals, which has eased market pressures and improved supply conditions.

In **Togo**, price movements are more fragmented across regions. The Centrale retail market price declined 7.3% month-on-month, while the DAGL (Lomé) region experienced a steep 41.7% monthly fall, consistent with longer term drops of 40.6%, 38.1%, and 21.3%. Conversely, the Maritime region stands out as an anomaly, with prices surging 47.2% month-on-month, and remaining modestly higher by 3.0% over three months and 0.9% over six months, suggesting localised supply constraints or market disruptions. Meanwhile, the Savanes region recorded a sharp 18.5% monthly decline, aligning with broader downward trends of 27.7%, 30.3%, and 34.8% over three, six, and twelve months.

Table 15: Percentage changes in maize prices in West Africa³⁹

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Ghana	Maize (white)	National Average, (GHS/MT)	4,419.74	-6.30 ↓	-23.57 ↓	-33.66 ↓	-36.05 ↓
Nigeria	Maize (white)	National Average, NGN/KG	381.39	-7.50 ↓	-14.42 ↓	-25.33 ↓	
Togo	Maize (white), XOF/Kg	Centrale,Retail, XOF/Kg*	191.00	-7.28 ↓	-15.11 ↓	-19.75 ↓	-34.81 ↓
Togo	Maize (white), XOF/Kg	DAGL (Lomé) Region, Retail, XOF/Kg*	161.00	-41.67 ↓	-40.59 ↓	-38.08 ↓	
Togo	Maize (white), XOF/Kg	Maritime,Retail, XOF/Kg*	237.00	47.20 ⬆	3.04 ⬆	0.85 ⬆	-21.26 ↓
Togo	Maize (white), XOF/Kg	Savanes,Retail, XOF/Kg*	159.00	-18.46 ↓	-27.73 ↓	-30.26 ↓	-34.84 ↓

Note: Last price is for September 2025, * August 2025, and ** July 2025

● = no change, ▲ = low increase (0-5%), ⬆ = moderate increase (5-15%), ⬇ = high increase (>15%),
 ▽ = low decrease (0-5%), ▾ = moderate decrease (5-15%), ▿ = high decrease (>15%)

Rice

Figure 16: Price spreads for rice across select West African Countries⁴⁰

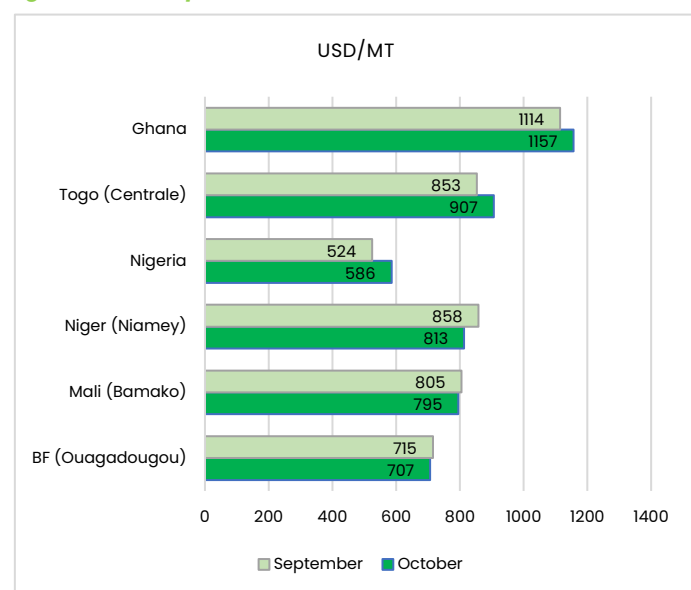


Figure 16 illustrates rice price movements in USD across six West African countries, showing mixed movements between September and October, with notable increases in some markets and declines in others. **Ghana** recorded the highest prices to USD 1,157/MT in October, a 3.9% increase, largely attributed to local currency appreciation. **Togo** (Centrale) also saw a significant uptick of about 6.3%, to USD 907/MT, suggesting localised supply constraints. **Nigeria** experienced the sharpest increase, jumping 11.8% to USD 586/MT, despite the government policy interventions, suggesting long-term supply constraints due to high consumer demand. Conversely, **Niger** (Niamey) prices fell to USD 813/MT, a 5.2% decline, while **Mali** (Bamako) dropped slightly by 1.2%, and Burkina Faso (Ouagadougou) eased marginally from USD 715/MT to USD 707/MT. These declines reflect improved local availability and early harvest inflows.

Table 16 further exhibits mixed short-term movements but an overall downward trend over longer periods, reflecting seasonal harvest effects and policy interventions. **Burkina Faso** shows relative stability in most wholesale markets, with negligible monthly changes but significant declines over three and six months (up to -19.6%), while year-on-year prices remain slightly high in some markets (e.g., Bobo Dioulasso at +1.19%). **Ghana** recorded a sharp 8.85% monthly drop to GHS 12,546.88/MT, consistent with improved domestic supply and buffer stock interventions. In **Mali**, prices are largely stable, with minor monthly fluctuations (e.g., Mopti up 2.08%) but steep declines over longer horizons, reaching -25.29% year-on-year, indicating sustained supply improvements. **Niger** shows mixed trends: Niamey prices fell by 7.69% month-on-month, while other markets like Agadez and Dosso recorded smaller declines, yet all exhibit significant annual drops (up to -25.81%). **Nigeria** stands out with a notable 15.43% monthly increase to NGN 848.97/kg, despite longer-term declines, suggesting market easing from long-term supply constraints with impact of policy shifts expected to be felt in near future. **Togo** presents the most volatility: Centrale prices rose by 8.37%, Maritime surged by 19.20%, and Savanes jumped to 16.81%, contrasting with steep quarterly and annual declines (up to -35.14%), pointing to localised market disruptions amid the ongoing harvesting season. Overall, the data highlights a regional

³⁹ Author's construction based on 1) AGRA MIS for Ghana & Nigeria; and 2) FAO data for Togo

⁴⁰ These price spreads are calculated based on online rates on the last day of the month at <https://www.oanda.com/currency-converter/en>

pattern of long-term price softening driven by harvest inflows and trade measures, with isolated short-term spikes in Nigeria and Togo signalling uneven market dynamics.

Table 16: Percentage changes in rice prices in West Africa⁴¹

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Burkina Faso	Rice (imported)	Bobo Dioulasso, Wholesale, XOF/100 kg	42,500.00	0.00 ●	0.00 ●	0.00 ●	1.19 ▲
Burkina Faso	Rice (imported)	Dori, Wholesale, XOF/100 kg	45,000.00	0.00 ●	-19.64 ↓	-19.64 ↓	-13.46 ↓
Burkina Faso	Rice (imported)	Fada N'gourma, Wholesale, XOF/100 kg	45,000.00	0.00 ●	-10.00 ↓	-10.00 ↓	0.00 ●
Burkina Faso	Rice (imported)	Ouagadougou, Wholesale, XOF/100 kg	40,000.00	0.00 ●	-2.44 ▬	-13.04 ↓	-20.00 ↓
Ghana	Rice	National Average, (GHS/MT)	12,546.88	-8.85 ↓	-15.32 ↓	-14.33 ↓	-20.25 ↓
Mali	Rice	Bamako, Wholesale, XOF/100 KG	45,000.00	0.00 ●	0.00 ●	-6.25 ↓	-19.64 ↓
Mali	Rice	Gao, Wholesale, XOF/100 KG	65,000.00	0.00 ●	0.00 ●	0.00 ●	-7.14 ↓
Mali	Rice	Kayes, Wholesale, XOF/100 KG	52,000.00	0.00 ●	0.00 ●	-3.70 ▬	-13.33 ↓
Mali	Rice	Mopti, Wholesale, XOF/100 KG	49,000.00	2.08 ▲	0.00 ●	0.00 ●	-6.67 ↓
Mali	Rice	Sikasso, Wholesale, XOF/100 KG	42,500.00	0.00 ●	-5.56 ↓	-5.56 ↓	-22.73 ↓
Mali	Rice	Tombouctou, Wholesale, XOF/100 KG	45,000.00	-8.16 ↓	-10.00 ↓	-8.16 ↓	-25.00 ↓
Mali	Rice (imported)	Bamako, Wholesale, XOF/100 KG	41,000.00	0.00 ●	-14.58 ↓	-14.58 ↓	-19.61 ↓
Mali	Rice (imported)	Gao, Wholesale, XOF/100 KG	56,000.00	0.00 ●	-6.67 ↓	-6.67 ↓	-12.50 ↓
Mali	Rice (imported)	Kayes, Wholesale, XOF/100 KG	32,500.00	0.00 ●	-1.52 ▬	-14.47 ↓	-25.29 ↓
Mali	Rice (imported)	Mopti, Wholesale, XOF/100 KG	45,000.00	0.00 ●	-10.00 ↓	-10.00 ↓	-14.29 ↓
Mali	Rice (imported)	Sikasso, Wholesale, XOF/100 KG	45,000.00	0.00 ●	-6.25 ↓	-10.00 ↓	-10.00 ↓
Niger	Rice (imported)	Agadez, Wholesale, XOF/Kg	480.00	-7.69 ↓	-7.69 ↓	-22.58 ↓	-25.00 ↓
Niger	Rice (imported)	Dosso, Wholesale, XOF/Kg	480.00	-7.69 ↓	0.00 ●	-14.29 ↓	-25.00 ↓
Niger	Rice (imported)	Niamey, Wholesale, XOF/Kg	460.00	-4.17 ▬	-8.00 ↓	-14.81 ↓	-25.81 ↓
Nigeria	Rice (milled)	National Average, NGN/KG	848.97	9.15 ↑	-16.13 ↓	-25.94 ↓	
Togo	Rice (imported)	Centrale, Retail, XOF/Kg*	513.00	7.55 ↑	-0.97 ▬	3.43 ▲	-0.58 ▬
Togo	Rice (imported)	DAGL (Lomé) Region, Retail, XOF/Kg*	454.00	-27.36 ↓	-32.34 ↓	-35.14 ↓	
Togo	Rice (imported)	Maritime, Retail, XOF/Kg*	625.00	9.27 ↑	32.42 ⓧ	16.82 ⓧ	-1.26 ▬
Togo	Rice (imported)	Savanes, Retail, XOF/Kg*	535.00	16.81 ⓧ	12.63 ↑	-0.19 ▬	-18.57 ↓

Note: Last price is for September 2025, * August 2025, and ** July 2025

● = no change, ▲ = low increase (0-5%), ↑ = moderate increase (5-15%), ⓧ = high increase (>15%),
 ▬ = low decrease (0-5%), ↓ = moderate decrease (5-15%), ↓ = high decrease (>15%)

Millet

Figure 17: Price spreads for millet across select West African Countries⁴²

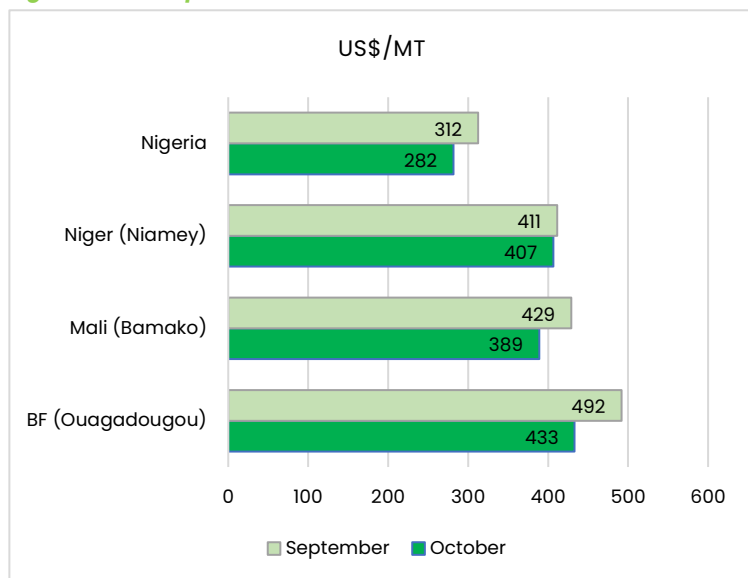


Figure 17 illustrates the decline in millet prices across West African markets from September to October, attributable to seasonal harvest inflows and prevailing market dynamics. **Burkina Faso (Ouagadougou)** posted the steepest drop, falling by **12%** from to USD 433/MT, while **Mali (Bamako)** decreased by 9.3% to USD 389/MT. **Nigeria** also recorded a significant 9.6% decline to USD 282/MT, indicating improved availability and possible policy-driven supply. In contrast, **Niger (Niamey)** remained stable, easing slightly by 1% to USD 407/MT. Overall, the trend points to widespread price softening across most markets, with Burkina Faso and Mali experiencing the most pronounced declines of millet prices in USD across selected West African countries.

Table 17 shows that millet prices across Burkina Faso, Mali, Niger, and Nigeria show a general downward trend over the past month and longer periods, with some regional variations. In **Burkina Faso**, markets remained largely stable month-on-month, with most wholesale prices unchanged (e.g., Bobo Dioulasso at XOF 38,000/100kg). However,

⁴¹ Author's construction based on 1) AGRA MIS for Ghana & Nigeria; and 2) FAO data for Burkina Faso, Mali, Niger, and Togo

⁴² These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

significant declines were observed over three and six months, reaching -30.77% in Dédougou and -21.25% in Dori, reflecting strong harvest inflows. **Mali** prices were generally stable or declined across all timeframes, except in Sikasso (up 10% over three months) and Tombouctou (up 9.59% month-on-month, 11.11% over three months, and 5.26% over six months) due to market disruptions, though all markets remain very low year-on-year. In **Niger** prices were mostly stable and subdued, with minor spikes in Dosso (+4.55% month-on-month) and Zinder (+3.85% month-on-month, +8% year-on-year) signalling localised demand pressures. **Nigeria** recorded a notable 11.92% monthly decline to NGN 408.10/kg, with deeper drops of -24.84% over three months and -23.39% over six months, underscoring improved availability and policy-driven supply easing.

Table 17: Percentage changes in millet prices in select West African Countries⁴³

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Burkina Faso	Millet	Bobo Dioulasso, Wholesale, XOF/100 kg	38,000.00	0.00 ●	0.00 ●	0.00 ●	0.00 ●
Burkina Faso	Millet	Dédougou, Wholesale, XOF/100 kg	22,500.00	-10.00 ↓	-25.00 ↓	-30.77 ↓	-43.75 ↓
Burkina Faso	Millet	Dori, Wholesale, XOF/100 kg	31,500.00	-14.86 ↓	-17.11 ↓	-21.25 ↓	-33.68 ↓
Burkina Faso	Millet	Fada N'gourma, Wholesale, XOF/100 kg	29,000.00	0.00 ●	-9.38 ↓	-12.12 ↓	-3.33 ↘
Burkina Faso	Millet	Kongoussi, Wholesale, XOF/100 kg	37,500.00	0.00 ●	-11.76 ↓	-11.76 ↓	-11.76 ↓
Burkina Faso	Millet	Nouna, Wholesale, XOF/100 kg	25,500.00	-8.93 ↓	-15.00 ↓	-27.14 ↓	-15.00 ↓
Burkina Faso	Millet	Ouagadougou, Wholesale, XOF/100 kg	24,500.00	-10.91 ↓	-18.33 ↓	-27.94 ↓	-36.36 ↓
Burkina Faso	Millet	Tenkodogo, Wholesale, XOF/100 kg	32,500.00	-13.33 ↓	-16.67 ↓	-23.53 ↓	-25.29 ↓
Mali	Millet	Bamako, Wholesale, XOF/100 KG	22,000.00	-8.33 ↓	-8.33 ↓	-29.03 ↓	-43.59 ↓
Mali	Millet	Gao, Wholesale, XOF/100 KG	32,500.00	0.00 ●	-7.14 ↓	-13.33 ↓	-31.58 ↓
Mali	Millet	Kayes, Wholesale, XOF/100 KG	28,000.00	-6.67 ↓	0.00 ●	-20.00 ↓	-30.00 ↓
Mali	Millet	Mopti, Wholesale, XOF/100 KG	23,000.00	-14.81 ↓	-17.86 ↓	-30.30 ↓	-41.03 ↓
Mali	Millet	Ségou, Wholesale, XOF/100 KG	17,500.00	-7.89 ↓	-12.50 ↓	-32.69 ↓	-50.00 ↓
Mali	Millet	Sikasso, Wholesale, XOF/100 KG	27,500.00	0.00 ●	10.00 ↑	-15.38 ↓	-31.25 ↓
Mali	Millet	Tombouctou, Wholesale, XOF/100 KG	40,000.00	9.59 ↑	11.11 ↑	5.26 ↑	-3.61 ↘
Niger	Millet	Agadez, Wholesale, XOF/Kg	288.00	-12.06 ↓	-21.74 ↓	-28.00 ↓	-44.62 ↓
Niger	Millet	Dosso, Wholesale, XOF/Kg	230.00	4.55 ▲	-16.36 ↓	-19.30 ↓	-42.50 ↓
Niger	Millet	Maradi, Wholesale, XOF/Kg	140.00	-26.32 ↓	-44.00 ↓	-48.15 ↓	-45.10 ↓
Niger	Millet	Niamey, Wholesale, XOF/Kg	230.00	0.00 ●	-17.86 ↓	-20.69 ↓	-28.13 ↓
Niger	Millet	Tillabéri, Wholesale, XOF/Kg	260.00	-3.70 ↘	-13.33 ↓	-16.13 ↓	-23.53 ↓
Niger	Millet	Zinder, Wholesale, XOF/Kg	270.00	3.85 ▲	-18.18 ↓	-20.59 ↓	8.00 ↑
Nigeria	Millet	National Average, NGN/KG	408.10	-11.92 ↓	-24.84 ↓	-23.39 ↓	

Note: Last price is for September 2025, * August 2025, and ** July 2025

● = no change, ▲ = low increase (0–5%), ↑ = moderate increase (5–15%), ✖ = high increase (>15%),
 ↘ = low decrease (0–5%), ↓ = moderate decrease (5–15%), ▼ = high decrease (>15%)

Sorghum

Figure 18: Price spreads for sorghum across select West African Countries⁴⁴

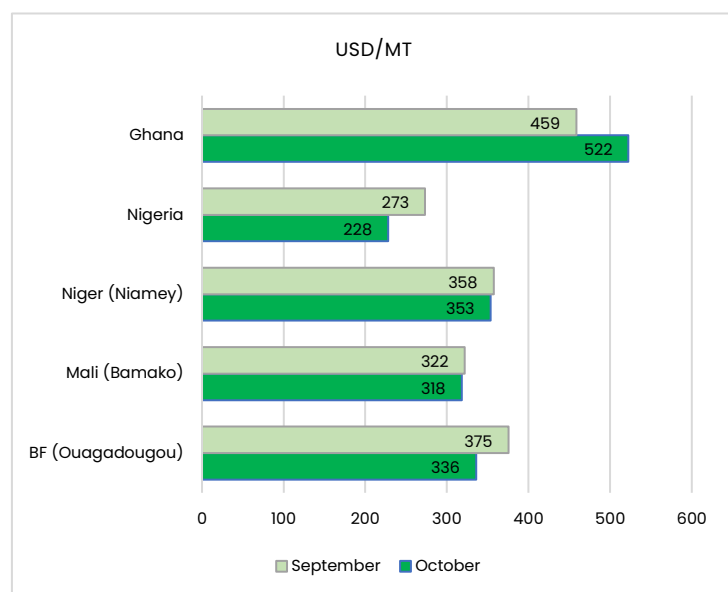


Figure 18 illustrates sorghum price movements in USD/MT across five West African markets for October. **Ghana** recorded the highest price and the sharpest increase, rising 14% to USD 522/MT, largely due to local currency appreciation. In contrast, **Nigeria** saw the steepest decline, dropping by 16.5% to USD 228/MT, reflecting improved availability. **Burkina Faso** also fell significantly by 10.4%, while **Mali** and **Niger** remained relatively stable with marginal declines of 1–1.4%. Overall, Ghana's upward movement contrasts with widespread price softening in other markets, underscoring localised supply dynamics and regional harvest effects.

Table 18 mirrors USD price trends in local currencies, showing broad declines driven by seasonal harvest inflows and improved supply. **Burkina Faso** markets

⁴³ Author's construction based on 1) AGRA MIS for Ghana & Nigeria; and 2) FAO data for Burkina Faso, Mali, Niger, and Togo

⁴⁴ These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

remained stable month-on-month but posted steep drops over three months to one year, up to 41.67% in Dédougou, signalling improved supply. **Mali** markets are mostly stable, except for Tombouctou, which surged by 12.68% month-on-month and 17.65% over six months, contrasting with steep declines elsewhere (e.g., Mopti down 20.83%). Longer-term trends in Mali remain negative, with drops of up to 50% year-on-year, indicating sustained price easing. In **Niger**, most markets exhibited price stability or declines across all timeframes, underscoring the impact of trader destocking and government-subsidised sorghum sales interventions. Similarly, **Nigeria** recorded a sharp 18.39% monthly decline, with deeper reductions of 26% over three months and 31.72% over six months, reflecting policy-driven market supply easing. Overall, the trends point to widespread price softening across the region, with isolated short-term spikes observed in **Mali**.

Table 18: Percentage changes in sorghum prices in select West African countries ⁴⁵

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Burkina Faso	Sorghum	Bobo Dioulasso, Wholesale, XOF/100 kg	23,000.00	2.22 ▲	2.22 ▲	-2.13 ▮	-8.00 ↓
Burkina Faso	Sorghum	Dédougou, Wholesale, XOF/100 kg	17,500.00	-16.67 ↓	-30.00 ↓	-36.36 ↓	-41.67 ↓
Burkina Faso	Sorghum	Dori, Wholesale, XOF/100 kg	26,000.00	-10.34 ↓	-21.21 ↓	-25.71 ↓	-30.67 ↓
Burkina Faso	Sorghum	Fada N'gourma, Wholesale, XOF/100 kg	25,000.00	0.00 ●	-3.85 ▮	-7.41 ↓	-15.25 ↓
Burkina Faso	Sorghum	Kongoussi, Wholesale, XOF/100 kg	25,000.00	0.00 ●	0.00 ●	-9.09 ↓	-16.67 ↓
Burkina Faso	Sorghum	Nouna, Wholesale, XOF/100 kg	19,000.00	-19.15 ↓	-24.00 ↓	-24.00 ↓	-30.91 ↓
Burkina Faso	Sorghum	Ouagadougou, Wholesale, XOF/100 kg	19,000.00	-9.52 ↓	-20.83 ↓	-30.91 ↓	-32.14 ↓
Burkina Faso	Sorghum	Tenkodogo, Wholesale, XOF/100 kg	18,500.00	-19.57 ↓	-28.85 ↓	-33.93 ↓	-33.93 ↓
Ghana	Sorghum	National Average, (GHS/MT)	5,666.67	0.00 ▮	-1.33 ▮	-18.07 ↓	-30.89 ↓
Mali	Sorghum	Bamako, Wholesale, XOF/100 KG	18,000.00	0.00 ●	-14.29 ↓	-18.18 ↓	-44.62 ↓
Mali	Sorghum	Gao, Wholesale, XOF/100 KG	35,000.00	0.00 ●	16.67 ✖		
Mali	Sorghum	Kayes, Wholesale, XOF/100 KG	24,000.00	0.00 ●	-4.00 ▮	-4.00 ▮	-31.43 ↓
Mali	Sorghum	Mopti, Wholesale, XOF/100 KG	19,000.00	-13.64 ↓	-17.39 ↓	-20.83 ↓	-39.68 ↓
Mali	Sorghum	Ségou, Wholesale, XOF/100 KG	17,500.00	-12.50 ↓	-12.50 ↓	-20.45 ↓	-50.00 ↓
Mali	Sorghum	Sikasso, Wholesale, XOF/100 KG	20,000.00	0.00 ●	0.00 ●	-11.11 ↓	-33.33 ↓
Mali	Sorghum	Tombouctou, Wholesale, XOF/100 KG	40,000.00	12.68 ↑	14.29 ↑	17.65 ✖	14.29 ↑
Niger	Sorghum	Agadez, Wholesale, XOF/Kg	260.00	-20.25 ↓	-35.00 ↓	-27.78 ↓	-51.85 ↓
Niger	Sorghum	Dosso, Wholesale, XOF/Kg	235.00	-2.08 ▮	-6.00 ↓	-14.55 ↓	-37.33 ↓
Niger	Sorghum	Maradi, Wholesale, XOF/Kg	140.00	-20.00 ↓	-50.00 ↓	-26.32 ↓	-56.25 ↓
Niger	Sorghum	Niamey, Wholesale, XOF/Kg	200.00	0.00 ●	-20.00 ↓	-27.27 ↓	-53.49 ↓
Niger	Sorghum	Tillabéri, Wholesale, XOF/Kg	210.00	-8.70 ↓	-28.81 ↓	-30.00 ↓	-50.00 ↓
Niger	Sorghum	Zinder, Wholesale, XOF/Kg	200.00	0.00 ●	-9.09 ↓	-16.67 ↓	-21.57 ↓
Nigeria	Sorghum (white)	National Average, NGN/KG	330.69	-18.39 ↓	-26.00 ↓	-31.72 ↓	

Note: Last price is for September 2025, * August 2025, and ** July 2025

● = no change; ▲ = low increase (0–5%), ↑ = moderate increase (5–15%), ✖ = high increase (>15%),
 ▮ = low decrease (0–5%), ↓ = moderate decrease (5–15%), ↓ = high decrease (>15%)

Seasonal Monitor and Cropping Conditions⁴⁶

Harvesting of main season cereals is complete or nearing completion across all countries in **West Africa**, with yields generally near average due to favourable rainfall, though conflict-affected areas continue to experience below-average production. The 2025 rainfall season has been averaging to above average and well distributed across the subregion, supporting generally favourable crop growth and development. In **Nigeria**, heavy rains and flooding caused localised crop losses, but overall impacts are less severe than last year, with second season rice harvesting currently underway. Meanwhile, planting and development of second season maize and sorghum are underway along the Gulf of Guinea, including in **Côte d'Ivoire**, southern **Ghana**, southern **Togo**, southern Benin, southern Nigeria, and Cameroon.

⁴⁵ Author's construction based on 1) AGRA MIS for Ghana & Nigeria; and 2) FAO data for Burkina Faso, Mali, Niger, and Togo

⁴⁶ [EarlyWarning_CropMonitor_202510.pdf](#)

Food Trade Updates

- The East African Business Council (EABC) has launched a digital trade information booth at the Taveta–Holili one-stop border post to support small-scale cross-border traders in overcoming non-tariff barriers. The booth provides access to online reporting of NTBs, whistleblowing and complaint mechanisms, as well as a market information platform.⁴⁷

East Africa Region

Figure 19 provides an overview of the events and activities that have taken place across various countries in East Africa in the last month and are affecting the food trade in the region.

Figure 19: East Africa cross-border trade updates, October 2025



Ethiopia

Ethiopia has officially commenced shipments of goods under the framework of the African Continental Free Trade Area (AfCFTA) agreement. The first batch comprising meat, fruits, and various agricultural products, was dispatched to Somalia, Kenya, and South Africa.

Southern Africa Region

Figure 20 provides an overview of the events and activities that have taken place across various countries in Southern Africa in the last month and are affecting the food trade in the region.

Figure 20: Southern Africa cross-border trade updates, October 2025



Zimbabwe

The Government of Zimbabwe has lifted its ban on the importation of maize, grains, oilseeds, and related products, reversing restrictions enacted in August 2025. The policy now allows imports while introducing phased local sourcing requirements (40% by April 2026 and 100% by April 2028) to protect domestic farmers.

Malawi & Zambia

The Government of Malawi has secured a 200,000 tonnes maize import deal with Zambia, although this is not sufficient to meet the projected maize deficit of 450,000 tonnes during the lean season. Tanzania has mandated its national food reserve agency to sell maize through an in-country office, hoping to provide a faster and formalised maize supply in Malawi.

⁴⁷ <https://www.theeastafrican.co.ke/tea/business-tech/eabc-opens-holili-help-booth-tackle-cross-border-trade-barriers-5219392>

West Africa Region

Figure 21 provides an overview of the events and activities that have taken place across various countries in Southern Africa in the last month and are affecting the food trade in the region.

Figure 21: West Africa cross-border trade updates, October 2025



Ghana & Niger

Ghana and Niger have signed a new trade agreement to streamline their shared transit corridor by harmonising customs procedures, improving cargo tracking, and reducing extortion and excessive checkpoints that inflate trading costs between West Africa's coast and its landlocked interior.



The digital Regional Food Balance Sheet provides near real-time estimates and projections for core staple crop production, stock levels, and other information in East and Southern Africa.

For more information
please visit <https://rfbsa.com/>



FOOD SECURITY MONITOR

EDITION 63 • OCTOBER 2025

AFRICA FOOD TRADE AND RESILIENCE INITIATIVE

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